



2014

SAN FRANCISCO COMMERCE & INDUSTRY INVENTORY

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2014

SAN FRANCISCO COMMERCE & INDUSTRY INVENTORY

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About the 2014 Commerce & Industry Inventory

This is the 21st Commerce & Industry Inventory prepared by the San Francisco Planning Department. It presents findings and data on economic activities in San Francisco from 2005 through 2014, including population, labor force, employment, establishments, wages, retail sales, monetary transactions, building activity, land use, and transportation.

The short-term goal of this annual Inventory is to make local land use-related economic data available to community groups, businesses, and private and public agencies.

The long-term goal is to establish a consistent time series of economic land use-related data and compile background information for the periodic update of the Commerce and Industry Element of the San Francisco General Plan.

The 2014 Commerce & Industry Inventory is organized as follows:

1. About the 2014 Commerce & Industry Inventory
2. Infographic Highlights
3. Findings: San Francisco Economy in 2014
4. Appendix: Data 2014

The first three sections summarize key points. The Appendix contains the updated text and data continued from previous Commerce and Industry Inventories.

FORMAT OF THE 2014 COMMERCE & INDUSTRY INVENTORY

The **Infographic Highlights** presents key findings in simple, bold graphics, and is available as a stand-alone document. **Findings: The San Francisco Economy in 2014** summarizes key points for 2014. The **Appendix** contains the full data tables and describes the methodology.

A spreadsheet of the C&I data is also available electronically on the Planning Department's website, along with the document and links to the data on DataSF (<https://data.sfgov.org>).

The Planning Department welcomes your thoughts and suggestions for improving the *Commerce & Industry Inventory*. You can send them to paolo.ikezoe@sfgov.org

THE DATA APPENDIX

The Data Appendix contains seven chapters:

- **1.0 Introduction** explains data formats, economic indicators, variables, industrial classification system
- **2.0 Regional Overview** presents the San Francisco Bay Area's economy in historical and geographical context for four subregions.
- **3.0 Employment** presents data for Industry Group, Land Use Category, and Commerce and Industry (C&I) District.
- **4.0 Establishments** presents data on the number and distribution of active business establishments by Industry Group, Land Use Category, and Commerce & Industry District, and Establishment Size
- **5.0 Monetary Transaction** includes data on wages, taxable retail sales and sales permits, city government revenues and expenditures.
- **6.0 Building and Land Use** presents the number of building permit applications and total construction cost estimated for all permit applications, including those for new construction and demolitions/alterations. Permit application status is reported for the current year only. The square footage of the land use footprint is presented by planning area.
- **7.0 Transportation** includes commuter transportation mode, net added parking spaces, private vehicle occupancy rate, transit ridership, and Transit Impact Development Fee (TIDF) revenues.

The rest of this "About" section summarizes information regarding data and method that is useful for understanding the Infographic and the Findings sections. Appendix Chapter 1.0, Introduction, describes data and method in detail.

Data Formats

This Inventory presents economic data in terms of type of activity, and geographic distribution. Economic indicators use various metrics, such as employees, establishments, and dollars. This Inventory groups data in three ways: (1) Land Use Category, (2) Commerce and Industry Districts, and (3) Industry Group. By using three specific data formats or groupings of the data,

the Inventory provides a framework for comparisons, cross-references, and cross-tabulations among various economic indicators.

The following section describes these groups as background for reading the **Infographic Highlights**, and the **Findings**. Readers will find a more detailed discussion of the data and tables in **Appendix Chapter 1, Introduction**.

Commerce & Industry (C&I) Districts

The Commerce and Industry (C&I) Districts are characterized by predominant economic activities, employment concentration, business density, and other spatial characteristics. *Map 1.1* in the Appendix shows their boundaries. Commerce and Industry Districts reflect the geographic variation in the concentration of land uses, as follows.

- The **Financial District** includes the city's densest area with the highest concentration of employment and establishments.
- The **Civic Center** has high concentrations of institutional and government activities.
- The **Van Ness** district encompasses a commercial corridor surrounded by mid- to high-density residential buildings.
- The **Mission** and **North Beach** districts have intense local retail activities and distinct identities for the local and visitor populations.
- The **South of Market (SoMa)** district contains a unique mix of office, PDR, residential and other uses, and contains a historic building stock adaptable to a range of uses.
- The **Bayview** district houses a high concentration of Production/Distribution/Repair (PDR) activities and has a relatively low density of population, employment, and establishments.
- The **North Central** district contains a great proportion of institutional activities, mainly health related, and is a transitional area between downtown and more residential areas to the west.

- The **Southwest** and **Northwest** districts are predominantly residential, with businesses concentrated in mostly local-serving neighborhood commercial districts. Overall business density is low.
- The **Unclassified** category represents home-based business establishments and organizations without physical addresses, particularly care givers, which do not register a physical address with the state and thus cannot be assigned to specific geographic districts. The Unclassified C&I district also includes San Francisco International Airport, Treasure Island, and Yerba Buena Island.

Land Use Categories

The classification of land use categories used in the C&I, and more broadly by the Planning Department, is unique to San Francisco. It was developed to facilitate the evaluation of economic information – such as employment, establishments, and transactions – related to land use policy development. The classification system matches type of economic activity with a corresponding type of land use, building structure, and land use pattern. The basis of this classification system is San Francisco's business activities and land use pattern. Thus, application of this land use classification system outside of San Francisco would require some adjustments.

The six Land Use categories include (1) Office, (2) Retail, (3) Production/Distribution/Repair (PDR), (4) Hotel, (5) Cultural/Institutional/Educational (CIE), and (6) Residential. The Residential land use category is used only in Appendix Chapter 6 for data on building permits and land use by plan areas. The definitions of each of these categories follows:

- **Office activity** includes professional services such as administration, legal services, architecture, engineering, real estate, computer services, research and development activities, and government administrative functions. Three types of spaces are considered: primary offices, which mainly include headquarters and large firms; secondary offices, which include small professional offices and services; and walk-in customer facilities such as bank branches.

- **Retail activity** includes large- and small-scale sales and services to walk-in customers, such as department stores, galleries, and eating and drinking establishments (restaurants, bars, fast food service, delicatessens, etc.). This category also includes neighborhood services and shops such as dry cleaners, and beauty shops.
- **Production/Distribution/Repair (PDR) activity** includes establishments related to processing, movement, and repair of goods and provision of citywide infrastructure. It includes manufacturing, wholesale, construction, transportation (including vehicle maintenance and repair), information, and utilities. Most of these activities take place in buildings with large, open floor plates—structures that can house machinery and equipment. Some of the food manufacturing and printing activities, however, are located in small shops due to the small scale of production, small machinery required, and/or reliance on the retail component of their business.
- **Hotel of Visitor activity** is defined as a separate Land Use Category because it has a direct relationship to the visitor sector and constitutes a specific type of land use and building structure. It includes any type of lodging such as hotel, motel, or bed and breakfast.
- **Cultural/Institutional/Educational (CIE) activities** cover the social spectrum of economy by including entertainment and artistic activities as well as health and educational services. This category covers the widest variety of space types from large establishments (hospitals, universities, schools, museums) to small studios or businesses (nightclubs, art studios). These activities are more geographically disparate than the other categories.
- **Private Household (Pvt HH)**, formerly counted under the CIE land use category, is tracked separately beginning in 2009 (because of improved data reporting). This land use category involves households located throughout San Francisco that contract for and employ workers on or about their premises in activities primarily concerned with the operation of the household. These household employees include cooks, maids, butlers, private caregivers, gardeners, grounds keeper/

caretakers, and other household maintenance workers. Starting in 2013, the Bureau of Labor Statistics reclassified In-Home Supportive Services (roughly 20,000 jobs) from the Private Household category to CIE.

Industry Groups

The Inventory uses the *North American Industry Classification System (NAICS)*. The NAICS classifies all business establishments based on similarity of business process used to produce goods or services. NAICS organizes all economic activity into 20 broad sectors to clearly establish and distinguish each industry sector from the other.

For simplicity, this *Commerce & Industry Inventory* uses the following 11 categories based on combining some NAICS industry sectors (see Appendix *Table I.7*).

- (1) Farm;
- (2) Natural Resources, Mining and Construction;
- (3) Manufacturing;
- (4) Trade, Transportation, Utilities;
- (5) Information;
- (6) Financial Activities;
- (7) Professional and Business Services;
- (8) Educational and Health Services;
- (9) Leisure and Hospitality;
- (10) Other Services; and
- (11) Government.

The Other Services group includes repair and maintenance, personal services, religious and grant making services, and services related to the operation of a private household. The Government group includes all civilian employees of federal, state, and local government, regardless of the activity of employee engagement.

Infographic Highlights

2014 Commerce &
Industry Inventory

SUMMARY

2014

Change from 2013

JOBS SEE TABLE 3.1

640,400 ▲ 5%

UNEMPLOYMENT RATE SEE TABLE 2.1.4

4.4% ▼ FROM 5.7%

ESTABLISHMENTS SEE TABLE 4.1

57,050 ▲ 3%

TOTAL WAGES CITYWIDE SEE TABLE 5.1

\$58.9B ▲ 9%

AVERAGE WAGE PER JOB SEE TABLE 5.1.2

\$91,940 ▲ 4%

BUILDING PERMITS SEE TABLE 6.1.1.A

28,170 ▲ 4%

CONSTRUCTION SPENDING SEE TABLE 6.1.1.B

\$4.8B ▼ 13%

TAXABLE RETAIL SALES SEE TABLE 6.2.1

\$18.8B ▲ 7%

CITY REVENUE SEE TABLE 6.3.1

\$4.9B ▲ 9%

JOBS



BUILDING PERMITS



CONSTRUCTION SPENDING



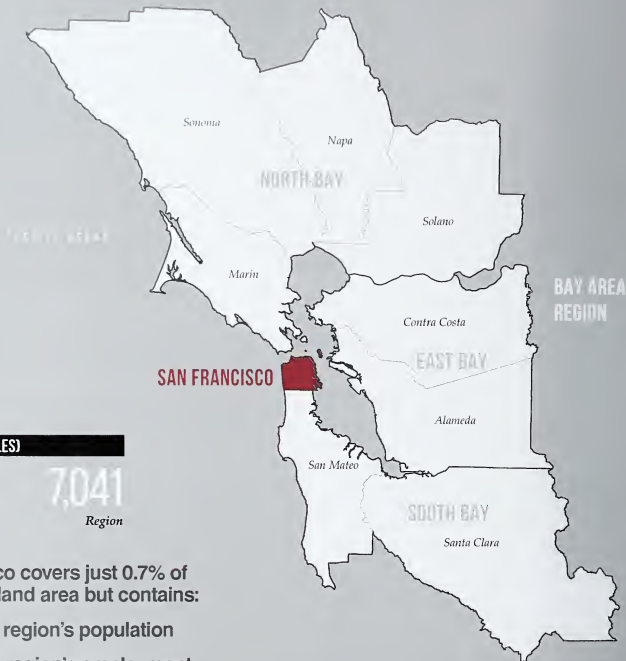
CITY EXPENDITURE

SEE TABLE 6.3.2

\$4.6B ▲ 5%

SAN FRANCISCO IN THE REGION

Small area. Large role.



LAND AREA (SQ. MILES)

47

San Francisco

7,041

Region

San Francisco covers just 0.7% of the region's land area but contains:

- 11% of the region's population
- 18% of the region's employment

2014 POPULATION

SEE TABLE 2.1.1

845,600 7,510,900

San Francisco

Region



11% San Francisco's share of regional population.

Record high SF population.

POPULATION CHANGE

SEE TABLE 2.1.1

5.7%[▲] 2006-2014 (7 YEAR) 6.7%

1.1%[▲] 2013-2014 (1 YEAR) 1.2%

San Francisco

Region

Continued growth.

2014 UNEMPLOYMENT RATE

SEE TABLE 2.1.4

4.4% San Francisco
▼ FROM 2013

5.4% Bay Area
▼ FROM 2013

7.5% State
▼ FROM 2013

Lower unemployment rate than region and State.

2014 JOBS

SEE TABLES 2.1.6 & 2.2.2

640,400 3,585,600

San Francisco

Region



18% San Francisco's share of regional jobs

Record high SF jobs.

JOB GROWTH

SEE TABLES 2.1.6 & 2.2.2

21%[▲] 2006-2014 (7 YEAR) 10%

5%[▲] 2013-2014 (1 YEAR) 4%

San Francisco

Region

SF job surge outpaces region.

SHARE OF JOBS BY SECTOR 2014

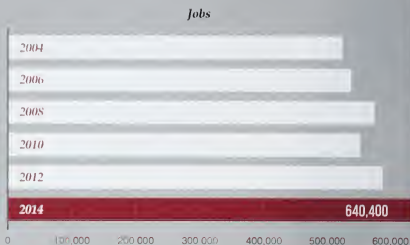
SEE TABLE 2.2.1

Employment Sector	San Francisco	Region
Other Services	1%	6%
Health, Education, Social Services	11%	15%
Professional & Business Services	27%	18%
Finance & Insurance	14%	17%

- More professional and visitor services.
- Less manufacturing, trade, transportation and utilities.

EMPLOYMENT IN SAN FRANCISCO

Employment up 5% in the past year, 21% over the decade.



Employment varied over the decade.

SEE TABLE 3.1

SHARE OF JOBS BY LAND USE

CHANGE IN # OF JOBS

Land Use Category	2005	2013	2014	2005-14
Office	27%	40%	41%	24%
Retail	18%	18%	18%	23%
Commercial, Institutional & Entertainment	16%	13%	13%	-4%
Health, Institutional & Educational	25%	26%	25%	23%
Hotel	4%	3%	3%	-10%
Public Services	-	4%	-	-

SEE TABLE 3.1

Office land use has most jobs.

All land uses added jobs over the decade, except PDR.

40%

Share of office land use jobs, 2014



-40%

Change in PDR land use jobs, 2005-2014

SHARE OF JOBS BY LAND USE

Highest concentration	2nd highest concentration
FINANCIAL 53%	SOMA 25%
SOMA 21%	FINANCIAL 17%
SOMA 37%	FINANCIAL 26%
NORTH CENTRAL 28%	SOUTHWEST 17%
FINANCIAL 31%	DIVID CENTER 30%

SEE TABLE 3.3

Office, Retail and PDR jobs concentrated in Financial and SOMA C&I Districts.

Hotels jobs concentrated in the Financial and Civic Center districts.

Other jobs more dispersed.

ESTABLISHMENTS IN SAN FRANCISCO

Establishments grew 3.4% from 2013.

TOTAL ESTABLISHMENTS (2014)

SEE TABLE 4.1

57,052

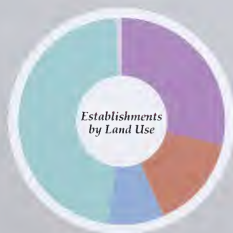
▲ 3.4%

Change from 2013

BY LAND USE CATEGORY

SEE TABLE 4.1

Non Private Household		2013	Change 2005-14
OFFICE	13,366	23%	▲ 24%
RETAIL	8,189	14%	▲ 10%
PRODUCTION / DISTRIBUTION / SERVICE	4,700	8%	▲ 3%
CULTURAL / RECREATIONAL / EDUCATIONAL	26,246	46%	▲ 66%
OTHER	311	1%	▲ 0%
	52,812	100%	▲ 24%
Private Household			
PRIVATE HOUSEHOLDS	4,240	100%	-



BY NUMBER OF EMPLOYEES

SEE TABLE 4.2

Excluding Private Household	Firms
0-4	37,082 70%
5-9	13,755 26%
10-49	1,063 2%
50-99	616 1%
100+	296 1%
	52,812 100%



LAND USE & BUILDING IN SAN FRANCISCO

Land Area

TOTAL LAND AREA

DEVELOPED

STREETS & FREEWAYS

47 SQ. MILES

71% 988M ^{Sq. ft.}

29%

DEVELOPED LAND AREA (988M SQ. FEET) SEE TABLE 6.8

Land Use Category

OFFICE	3%
RETAIL	2%
INDUSTRY / DISTRIBUTION / WAREHOUSE	6%
CULTURAL / INSTITUTIONAL / EDUCATIONAL USE	7%
LAND	0%
RESIDENTIAL	43%
MIXED USE / OTHER	7%
PUBLIC / RECREATIVE	29%
VACANT	5%



Office Space

2014 TOTAL OFFICE SPACE

SEE TABLE 6.5

75.4 M ^{Sq. ft.}

▲ 2%

▲ 8%

Change from 2013

Change from 2005

8.9 million square feet of office space added over the last ten years.

SHARE OF OFFICE SPACE

SEE TABLE 6.5



Central Business District

Rest of City

Roughly 2/3rds of the city's office space is in the Central Business District.

Building Permits

2014 BUILDING PERMITS

SEE TABLE 6.1.1.A

28,171

Active building permits

▲ 4%

Change from 2013

5%

Change from 2005

2014 BUILDING PERMIT STATUS

SEE TABLE 6.4.1.A

61%

Complete



17% Approved

22% Pending

22% Pending

BY CONSTRUCTION COST

SEE TABLE 6.1.1.B

\$4.8B

▼ 13%

Down \$0.7 billion from 2013

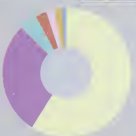
BY NUMBER OF PERMITS

SEE TABLE 6.1.1.A

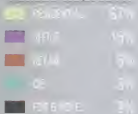


BY CONSTRUCTION COST

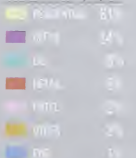
SEE TABLE 6.1.1.B



Land Use Category



Land Use Category



BY NUMBER OF PERMITS

SEE TABLE 6.2.1.A



District Location



BY CONSTRUCTION COST

SEE TABLE 6.2.1.B



District Location



Construction spending is highest for residential and office projects and in the SoMa and Financial C&I districts.

The majority of permits are for Residential and Office projects.

TRANSPORTATION IN SAN FRANCISCO

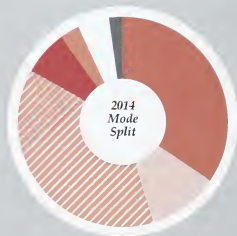
Driving alone to work is down.

Transit and bike commuting are up.

HOW EMPLOYEES IN SAN FRANCISCO COMMUTED TO WORK

Mode	2009	2014	Change
Drive alone	57%	33%	▼
Carpool (2+ people)	11%	10%	▼
Transit	35%	40%	▲
Bike	4%	8%	—
Walk	2%	3%	▲
Roller skis	5%	5%	—
Other	2%	3%	▲

SEE TABLE 7.1



PRIVATE VEHICLE OCCUPANCY (2008–2014)

1.14

2008

WORKING FOR SFPD

1.14

2014

SEE TABLE 7.3

DAILY MUNI RIDERSHIP (2010–2014)

SEE TABLE 7.4

654,400

2010

681,300

2014

Daily MUNI ridership up 4% since 2010.

BUSIEST MUNI LINES

SEE TABLE 7.4

Line	2010 Daily Trips	2014	Change
38 HEAVY	51,200	63,600	▲
69 SAN ANTONIO	48,800	62,800	▲
14 MISSION	40,200	47,600	▲
N JOURNAL	37,600	45,800	▲

TRANSIT IMPACT DEVELOPMENT FEE REVENUE

\$12.6M

FY 2013–2014

SEE TABLE 7.5

CITY GOVERNMENT

Revenues up 9%.

Spending on services up 5%.

2014 CITY REVENUE

SEE TABLE S.3.1

\$4.88B

▲ 9% FROM 2013

Revenue Source

PROPERTY TAXES	31%
BUSINESS TAXES	12%
ENTREPRENEURIAL TAXES	20%
LICENSES, PERMITS, FEES & PENALTIES	2%
INTEREST & INVESTMENT INCOME	0%
RENTS & DEVELOPING	2%
INTERGOVERNMENTAL	24%
CLARKESTER DEBATES	7%
OTHER	3%



2014 CITY REVENUE

SEE TABLE S.3.2

\$4.58B

▲ 3% FROM 2013

Expenditure Function

GENERAL FUND INCOME	26%
PROPERTY TAXES (TRANSFERS & OTHER)	5%
TRANSFERS FROM GOVERNMENT (LOCAL)	22%
COMMUNITY FUND	17%
CULTURE & EDUCATION	7%
CIVILIAN GOVERNMENT SERVICES	5%
GOVERNMENTAL SERVICES	2%
TRANSFERS	7%
CLARKESTER DEBATES	10%



Findings: San Francisco Economy in 2014

SUMMARY

Employment Grows – Economic Recovery Continues

A quick review of the main data in the *Commerce & Industry Inventory* reveals many positive signs, indicating continued strong economic growth in 2014.

- Employment, the simplest key indicator of economic activity, grew 5% over 2013, to 640,400 jobs (27,700 additional jobs). This surpasses 2013's previous record as the highest employment in the city's history.
- The unemployment rate fell from 5.7% to 4.4%.
- The number of business establishments increased to 57,050 firms, up 3% from 2013.
- Workers' earnings in the San Francisco economy increased to \$58.9 billion, 9% over 2013, with average earnings per job increasing to \$91,940 per worker.
- Building permit applications increased 11% over 2013 levels to 28,170 applications, and the estimated value or spending those projects represent in terms of project cost (not all of which will be spent locally in San Francisco) decreased to \$4.8 billion, down 13% from 2013.
- Taxable retail sales increased 7% over 2013 levels, to \$18.7 billion.
- City revenue was \$4.9 billion, up 9% over 2013.
- City expenditures were \$4.6 billion in 2014, up 5% from last year.

SAN FRANCISCO IN THE REGION

Small Area / Large Role

Although San Francisco is less than one percent (0.7%), or 47 square miles out of the 7,041 square miles of the region, it is 17 times denser (population per square mile), houses 11% of the region's residents, and captures 18% of regional employment.

San Francisco's population increased 1.1% in the past year, to 845,600 residents. This represents a 5.7% increase over the past decade. In comparison, the regional population of 7.51 million grew slightly faster, increasing 1.2% from 2013-2014 and 6.7% between 2005 and 2014.

Employment in San Francisco grew by 5% (by 27,700 jobs) in 2014, to 640,400 jobs. Over the past decade, this represents a 22% increase in employment in the city. In comparison, regional employment grew 10% between 2005 and 2014, to 3.59 million jobs.

San Francisco's share of regional employment by sector steadily increased between 2005 and 2014, from 16% of all jobs in the region to 18%. However, the *Share of Jobs* 2014 table below shows that San Francisco's economic profile differs from the region. It has about the same relative share of employment in the Information and Education & Health sectors as the region, but less in Manufacturing and Trade, Transportation & Utilities. However, the city has a higher proportion of jobs in services (Financial, Professional & Business, and Leisure and Hospitality) than the region as a whole.

San Francisco's declining unemployment rate - 4.4% in 2014 - was lower than the regional rate of 5.4%, the State rate of 7.5%, and the nationwide rate of 6.2%.

Share of Jobs 2014

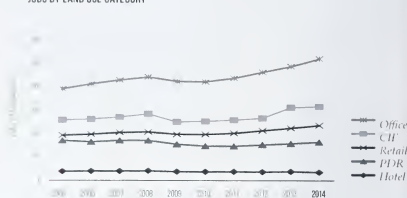
Employment Sector	San Francisco	Comparison	Region
Manufacturing	1%	Less	9%
Trade, Transport & Utilities	11%	Less	16%
Information	4%	Same	4%
Education & Health	14%	Same	15%
Prof. & Business Services	27%	More	19%
Leisure & Hospitality	14%	More	11%

San Francisco Employment by Land Use Category

TOTAL JOBS



JOBS BY LAND USE CATEGORY



EMPLOYMENT

Trends

The composition and changes in employment are an important window on San Francisco's economic vitality. Employment in San Francisco rose and fell over the last 10 years. The lingering effects of the dot.com crash caused employment in San Francisco to reach a low of 523,400 jobs in 2005. Employment then rose 9.1% to 571,000 jobs in 2008 at the height of the speculative financial bubble, before the global recession caused a 4.5% dip to 546,000 jobs in 2010. However, after showing signs of recovery in 2011, employment in the city has grown by around 5% every year starting in 2012, and is now at an all-time high of 640,400 jobs.

As the *San Francisco Employment by Land Use Category* graphs illustrate, jobs in the office, CIE, retail, and hotel land use categories followed a pattern similar to total jobs: a peak in 2008 and troughs in 2004 and 2010.¹ PDR jobs, however, show a longer term decline, falling early in the period, posting minor gains in 2007 (4% over 2006), and declining further after the financial crisis in late 2008. PDR jobs appear to have stabilized after 2010, growing at about the pace of the larger economy in

2012-2014.

Sectoral Composition and Geographic Concentration

The share of employment by land use category, and their relative ranking, has shifted somewhat between 2005 and 2014 (see *Employment by Land Use* table below) with the proportion of office jobs rising (from 37% to 41% of all jobs) as PDR jobs fell from 16% to 13%. In 2015, office jobs represented 40% of total employment, followed by CIE at 25%, Retail at 18%, PDR at 13%, Hotel with 3%, and Private Household at 1%.

Employment by Land Use

Land Use Category	Sector Shares			Rate of Change	
	2005	2013	2014	2005-14	2013-14
Office	37%	40%	41%	34%	7%
Retail	18%	18%	18%	23%	5%
PDR	16%	13%	13%	-4%	4%
Hotel	4%	3%	3%	-10%	-8%
CIE	25%	26%	25%	23%	1%
Pvt HH	-	1%	1%	na	36%
TOTAL	523,397	612,656	640,380	22%	5%

1. CIE employment from 2002-2008 estimated based on the share of private household to total CIE employment in years 2009-2012.

ESTABLISHMENTS

San Francisco had 57,052 establishments in 2014, a 3.4% increase from 2013. Approximately 7% of these, or 4,240 establishments, were private households,² most likely employing less than five workers per establishment. To understand San Francisco establishments better, private household establishments were separated from non-household firms. The 52,810 non-household firms make up 93% of San Francisco establishments in 2014. By land use category, 50% are CIE, 25% are Office land uses, 16% are Retail, 9% are PDR and 1% are Hotel.

Private household establishments are located in residences and in areas designated for residential land use. Like home-based businesses, they are a secondary commercial use that supports and does not displace or otherwise change the primary residential use. They can be accommodated in residential land uses and do not require the land use policy attention that commercial uses require.

2. The Private household establishment and land use category involves households located throughout San Francisco that contract for and employ workers on or about their premises in activities primarily concerned with the operation of the household. These household employees include cooks, house cleaners, butlers, private caregivers, gardeners, grounds keeper/caregivers, and other household maintenance workers.

The 34% increase in total establishments between 2005 and 2014 corresponds with employment growth over the same period. Change by land use type reveals establishment losses in PDR and hotel uses over the period, but substantial gains in office, retail and CIE (24%, 10% and 35%, respectively). Non-private household establishments increased by 34%.

In terms of firm size, 70% of non-household establishments in San Francisco employ fewer than 5 workers (see 2014 Non-Private Household Establishments by Size table below), and 26% employ 5-49 workers. Of the remaining 4% of establishments, 2% (1,063 firms) employ 50-99 workers, 2% (616 firms) employ 100-249 workers, and 1% (296 firms) employ 250 or more workers.

Establishments 2005–2014

Land Use	Number			Share	Change	
	2005	2013	2014	2014	2005-14	2013-14
Office	10,778	12,542	13,366	23%	24%	7%
Retail	7,450	7,947	8,189	14%	10%	3%
PDR	4,826	4,596	4,700	8%	-3%	2%
Hotel	320	305	311	1%	-3%	2%
CIE	19,254	25,597	26,246	46%	36%	3%
Subtotal	42,628	50,987	52,812		24%	4%
Pvt HH	0	4,184	4,240	8%	--	1%
TOTAL	42,628	55,171	57,052	100%	34%	3%

2014 Non-Private Household Establishments by Size

# of Employees	Number of Firms	Share
0-4	37,082	70%
5-49	13,755	26%
50-99	1,063	2%
100-249	616	1%
250+	296	1%
TOTAL	52,812	100%

MONETARY TRANSACTIONS

Wages

Wage and salary workers in San Francisco earned \$57.9B in 2014, up 8% from 2013 and 39% from 2004 (inflation adjusted). Total wages followed the larger trend of the economy. Approximately 62% (\$35.3B) of the total is earned by workers in Office land uses with the balance earned by workers in the following land use sectors: 16% in CIE, 14% in PDR, 7% in Retail, and 1% in Hotel. Based on employment, the average wage in San Francisco is \$91,940, with workers in Office land uses earning the highest average wage (\$138,900), followed by workers in PDR uses (\$97,300). Workers in CIE, Hotel, and Retail earn less than the citywide average, at \$59,800, \$46,700, and \$35,600, respectively, while Private Household workers average a wage of \$47,800.

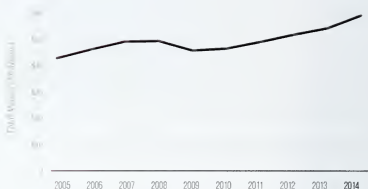
Taxable Retail Sales

Taxable retail sales (all outlets) amounted to \$18.8B in 2014, a 7% increase over 2013. Changes over time followed the larger economy.

City Revenues and Expenditures

In Fiscal Year 2014 (July 1, 2013 through June 30, 2014), City revenues amounted to \$4.9B, up 9% over 2013. City expenditures were lower than revenues, at \$4.6B, but grew 5% over 2013. Property Taxes were the largest revenue source at 31%, followed by Intergovernmental Transfers at 24%, Other Local Taxes at 20% and Business Taxes at 11%. Public Protection (police and fire) were the highest City expenditures at 26%, with Human Welfare and Neighborhood Development following at 22%, and Community Health the third highest at 17%.

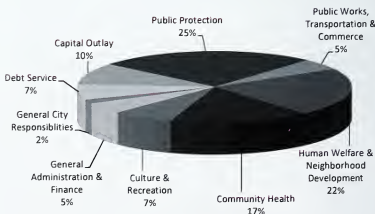
Total Wages (2014 \$s)



City Revenue 2014 (\$4.9 Billion)



City Expenditures 2014 (\$4.6 Billion)



LAND AREA AND BUILDING

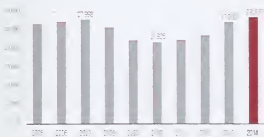
Land Area

San Francisco has 46.9 square miles of land area, of which 71% is developed (988 million square feet), while the remaining 29% are used for streets or freeways. Residential uses form the majority of San Francisco's land use footprint, occupying 42% of the city's land area. At 29%, Public and Open Space are the second biggest land uses, followed by Commercial uses at 17% (6% PDR, 2% Office, 0.4% Hotel, and 7% CIE). Mixed uses occupy 7% of the area while 5% of land area is vacant.

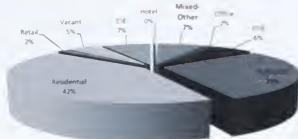
Building Permit Applications

In 2014, there were 28,171 active building permit applications, an increase of 4% over 2013, and a 1% increase over the previous peak of 27,998 applications in 2007. Approximately 97% of building permit applications were for demolition or alteration projects compared to new construction. Most of the applications were for Residential land uses (67%), with 16% for Office, 8% for Retail, 3% for CIE, and 1% each for PDR and Hotel uses. Approximately 61% of active building permit applications completed construction in 2014, with another 12% issued but not yet complete, 17% approved but not yet issued, 1% cancelled, and 9% not yet acted upon, abandoned, reinstated, or appealed (Other). Applications were for projects located mostly in the Southwest (30%), the North Central (13%), and the Financial (13%) C&I districts.

Building Permit Applications



Developed Land Area (988MSF)



The total value of building permit applications in terms of estimated construction cost was \$4.8 billion in 2014, a 37% increase over 2005 (\$3.5B) but a 13% decrease from last year's high of \$5.6B. New construction projects construction costs represented 55% or \$2.6B in value compared to \$2.2B, or 45%, for demolition/alteration applications. Approximately 61% of the building permit applications' cost was for residential projects, while 24% was for Office, 3% for retail, 8% for CIE, 2% for Hotel, and 1% for PDR projects. The C&I districts with the highest concentration of construction costs were the SOMA (31%) and Financial (22%) districts.

Central Business District (CBD) Office Space

Of the 75 million square feet of office space in San Francisco, approximately 66% is in the Central Business District (generally the Financial District north and south of Market Street). Total office space has increased 8% or 5.8 msf in San Francisco since 2005. In the CBD, office space increased about 10% from 2005-2014, or 2.4 msf.

Building Permit Applications by Type 2014

Land Use	Number (Share of 27,002)			Construction Cost (Share of \$2,666,458,000)		
	Total	New	Alterations	Total	New	Alterations
Office	16%	0.03%	16%	30%	9%	21%
Retail	9%	0.03%	9%	4%	0.07%	4%
PDR	1%	0.03%	1%	0.6%	0.34%	0.28%
Hotel	1%	0.01%	1%	2%	0.93%	1%
CIE	3%	0.04%	3%	3%	0.52%	2%
Residential	66%	0.57%	65%	59%	40%	20%
Other	4%	0.03%	2%	2%	0.26%	1%
Total	27,002	200	26,045	\$5,264,379	\$2,656,458	\$2,568,561
Shares	100%	0.74%	96.5%	100%	51%	49%

TRANSPORTATION

The *Commerce & Industry Inventory* presents basic data on San Francisco mobility in terms of commute mode split, parking entitlements, vehicle occupancy, transit ridership, and the Transit Impact Development Fee Revenue (TIDF).

Commute Mode Split

Data on mode split from 2009 and 2014 for workers commuting to San Francisco jobs (from within and outside the city) indicate that commuting by car, whether driving alone or in a carpool, has declined in popularity, while transit use continues to grow. In 2014, 33% of commute trips were made "driving alone," down 4 points from 36.6% in 2009. Transit share increased 4 point, from 35.6% in 2009 to 40% in 2014.

Private Vehicle Occupancy

Private vehicle occupancy during commute trips for workers commuting to San Francisco jobs (from within and outside the city) between 2008 and 2014 remained constant at 1.14.

Commute Mode Split

	2009	2013	2014	2009-2014	2013-2014
Drive Alone	36.6%	33.3%	33.0%	-3.6%	-0.2%
Carpool/Varpool	11.0%	9.4%	9.3%	-1.7%	-0.1%
Transit	35.6%	39.4%	40.0%	4.4%	0.5%
Walk	7.6%	7.8%	7.7%	0.1%	-0.1%
Bicycle	2.2%	2.7%	3.0%	0.8%	0.3%
Work at Home	4.8%	4.9%	4.8%	0.0%	-0.1%
Other	2.2%	2.6%	2.2%	0.0%	-0.3%

Daily Transit Ridership

Route Nos.	Route Name	2010	2014	2010-2014	
				Number	Rate
38, 38L, 38AX, 38BX	Geary	51,290	53,531	2,241	4%
9, 9L, 8X, 8AX, 8BX	San Bruno	49,804	52,903	3,099	6%
14, 14L, 14X	Mission	40,177	47,455	7,278	18%
N, Nx	Judah	37,598	45,631	8,033	21%
SYSTEMWIDE		654,428	679,453	25,025	3.8%

Daily Transit Ridership

Muni ridership increased 4% or by 25,000 daily trips from 654,000 in 2010 to 679,000 in 2014. The 38-Geary lines had the highest ridership, with 53,500 average daily trips, followed by the 8 an 9-San Bruno lines with 52,900 trips, the 14-Mission lines at 47,500 trips, and the N-Judah at 45,600 trips. (see Table 7.4 in the Appendix for details).

Transit Development Impact Fee

The Transit Impact Development Fee (TIDF) revenue was \$12.6 million in FY2014, up from \$4.7 million in FY2013. Annual TIDF revenue can vary widely, as the amount collected is based on the amount of development that occurs. Total revenues collected since FY2005 amount to \$33.8 million.



APPENDIX:

Data 2014

1.0 Introduction

This Data Appendix is organized into seven chapters.

- **Chapter 1 – Introduction** defines the data formats, economic indicators and the variables contained within each data set, and two industry classification systems used in the series of Inventories to present the economic data in chapters 2 through 5.
- **Chapter 2 – Regional Overview** presents San Francisco's economy in its historical and geographical context by reviewing population, labor force, employment, and unemployment indicators for the San Francisco Bay Area. This information is presented by four subregions of the Bay Area: North Bay, East Bay, South Bay, and San Francisco. Unemployment data for the Bay Area, California, and the United States are presented as well.
- **Chapter 3 – Employment** presents information on San Francisco's employment in three predefined data formats, which are: Industry Group, Land Use Category, and Commerce and Industry (C&I) District. These data formats are explained in Chapter 1 – Data Formats.
- **Chapter 4 – Establishments** reports the number of establishments as places where businesses are operated or where service and light industrial operations are performed. The chapter presents data on the number and distribution of active business establish-

ments by Industry Group, Land Use Category, and Commerce & Industry District, and Establishment Size/class.

- **Chapter 5 – Monetary Transactions** measures various aspects of the city's economy in monetary terms. This chapter provides data related to wages, taxable retail sales and sales permits, city government revenues and expenditures. Wage data are presented by Land Use Category; Taxable retail sales and permits data are presented by type of business. City government revenues and expenditures are reported by source and function.
- **Chapter 6 – Building and Land Use** provides information regarding construction activity in San Francisco. It presents the number of building permit applications and the total construction cost related to permit applications. The permit applications by permit status are reported only for the current year. This chapter also contains statistics on land use in San Francisco. The data in this chapter are derived from the San Francisco Department of Building Inspection and are summarized by neighborhood planning area rather than Commerce & Industry district boundaries used in chapters 2 through 5.
- **Chapter 7 – Transportation** describes recent trends in San Francisco's transportation and transit systems. This includes analysis of mode split (i.e., what kind of transportation people use to complete their trips), parking availability, vehicle occupancy (i.e., the number of people per private vehicle), transit service, and Transit Impact Development Fee (TIDF) revenues.

1.2 DATA FORMATS

The economic data in the Inventory are presented in terms of time, type of activity, and geographic distribution. The economic indicators are measured by their specific units such as employees, establishments, and dollars. The Inventory provides a framework for comparisons, cross-references, and cross-tabulations among various economic indicators by using three specific data formats or groupings of the data:

- Commerce and Industry Districts,
- Land Use Category, and
- Industry Group.

These data groups are discussed below. To the extent possible, the data in the Inventory, which are gathered from different sources, are aggregated into these three pre-defined formats. Some of the data remain in their original formats because of limited detail in the original data source.

Commerce & Industry Districts

The Commerce and Industry (C&I) Districts are characterized by predominant economic activities, employment concentration, business density, and other spatial characteristics. This classification aggregates small zip code based units into 10 large districts encompassing the entire city of San Francisco. Each district is defined by one or more postal zip codes because a zip code is traditionally the smallest geographical unit for which economic data are available. The district boundaries are as close as possible to census tract boundaries, so that data available from the census can be meaningfully compared to the economic data. The C&I district boundaries are shown on *Map 1.1*.

Commerce and Industry Districts are characterized by a concentration or specialization in one type of Land Use Activity or similar neighborhood commercial activities.

- The **Financial District** covers the densest area with the highest concentration of employment and establishments.
- The **Civic Center** is defined by its high concentration of institutional and government activities.
- The **Van Ness** district runs along a commercial corridor surrounded by mid- to high-density residential buildings.
- The **Mission** and **North Beach** districts are characterized by intense local retail activities and have very defined identities for the local and visitor population.
- The **South of Market** district contains a combination of office and PDR activities, located between the Financial District and Bayview.
- The **Bayview** district houses a high concentration of Production/Distribution/Repair (PDR) activities and shows a low density in terms of population, employment, and establishments.



Commerce and Industry Districts San Francisco

0 1 Mile

MAP 1.1



District Boundaries

Zip Code Boundaries

- The **North Central** district concentrates a great proportion of institutional activities, mainly health related, and is a transitional area between downtown and the more peripheral residential area to the west.
- The **Southwest** and **Northwest** districts are predominantly residential, with a very low business density.

Unclassified. In addition to the above ten zip code-based districts, there is an **Unclassified category**. This category represents home-based business establishments and organizations, particularly care-givers, that do not register a physical address with the State, and thus cannot be assigned to specific geographic districts. The Unclassified C&I district also includes San Francisco International Airport, Treasure Island, and Yerba Buena Island.

Plan Areas

The Inventory also provides information on geographic areas other than Commerce and Industry Districts. These areas are referred to as Plan Areas and are used exclusively in Chapter 6 (see *Map 6.2*). The neighborhood district boundaries tend to follow more homogenous economic patterns than the zip code-based Commerce and Industry districts.

Land Use Categories

This classification facilitates the evaluation of economic information – such as employment, establishments, and transactions – related to types of land use relevant to land use policy development. It matches the type of economic activity with a corresponding type of use and building structure as well as the prevalent land use pattern. This classification is based only on San Francisco's business activities and land use pattern. Its application outside of the city may require some adjustments.

The six Land Use categories used in this Inventory are: (1) Office, (2) Retail, (3) Production/Distribution/Repair (PDR), (4) Hotel, (5) Cultural/Institutional/Educational (CIE), and (6) Residential. The Residential land use category is addressed only in Chapter 6 in the context of building permits and land use by plan areas. The definitions of each of these categories are as follows:

- **Office** activity includes professional services such as administration, legal services, architecture, engineer-

ing, real estate, computer services, research and development activities, and government administrative functions. Three types of spaces are considered: primary offices, which mainly include headquarters and large firms; secondary offices, which include small professional offices and services; and walk-in customer facilities such as banking.

- **Retail** activity includes large- and small-scale sales and services to walk-in customers, such as department stores, galleries, and eating and drinking establishments (restaurants, bars, fast food service, delicatessens, etc.). This category also includes neighborhood services and shops such as dry cleaners, and beauty shops.
- **Production/Distribution/Repair (PDR)** activity includes establishments related to processing, movement, and repair of goods and provision of citywide infrastructure. It includes manufacturing, wholesale, construction, transportation (including vehicle maintenance and repair), information, and utilities. Most of these activities take place in buildings with large, open floor plates—structures that can house machinery and equipment. Some of the food manufacturing and printing activities, however, are located in small shops due to the small scale of production, small machinery required, and/or reliance on the retail component of their business.
- **Hotel or Visitor** activity is defined as a separate Land Use Category because it has a direct relationship to the visitor sector and constitutes a specific type of land use and building structure. It includes any type of lodging such as hotel, motel, or bed and breakfast.
- **Cultural/Institutional/Educational (CIE)** activities cover the social spectrum of economy by including entertainment and artistic activities as well as health and educational services. This category covers the widest variety of space types from large establishments (hospitals, universities, schools, museums) to small studios or businesses (nightclubs, art studios). These activities are more geographically disparate than the other categories. They are often specialized facilities, many of which are non-profit organizations.
- **Private Household (Pvt HH)**, formerly counted under the CIE land use category, is tracked separately beginning in 2009 (because of improved data reporting). This land use category involves households located throughout San Francisco that contract for and employ

workers on or about their premises in activities primarily concerned with the operation of the household. These household employees include cooks, maids, butlers, private caregivers, gardeners, grounds keeper/caretakers, and other household maintenance workers. Starting in 2013, the Bureau of Labor Statistics reclassified In-Home Supportive Services (roughly 20,000 jobs) from the Private Household category to CIE.

Industry Groups

This classification aggregates business establishments into Industry groups according to similarity of production process. The *North American Industry Classification System* (NAICS) is the current classification system. It was released in 1997 and last revised in 2007. It replaced the previous *Standard Industry Classification* (SIC) system based on similarity of product produced.

The United States Department of Commerce developed these two systems and the California Employment Development Department (EDD) adopted them. *Commerce & Industry Inventories 2002-2011* have a discussion of the relationship between the two classification systems because data from 2000 and earlier used the SIC system and data from 2001 onwards used the NAICS system (see *Tables 1.1* and *1.2*). *Commerce & Industry Inventory 2011* onwards, have an abbreviated discussion of the two classification systems because the 10-year time series uses the NAICS system exclusively.

The NAICS classifies all business establishments based on similarity of process used to produce goods or services. NAICS is a six-digit coding system. Under NAICS, the first two digits of the code are designated as sector to represent general categories of economic activities. The first three digits are designated as sub-sector to represent major categories of economic activities. The first four digits represent industry group, while the five and six digit classifications correspond to specific industries.

NAICS organizes all economic activity into 20 broad sectors (in contrast to the 10 sectors of the earlier SIC classification system). The purpose for this broad categorization is to clearly establish and distinguish each industry sector from another. NAICS also defined 350 new industries, including several new high-tech and services related industries which were not appropriately defined and recognized in the previous SIC system.

For simplicity, this *Commerce & Industry Inventory* uses the following 11 categories based on combining some NAICS' industry sectors (see *Table 1.1*): (1) Farm; (2) Natural Resources, Mining and Construction; (3) Manufacturing; (4) Trade, Transportation, Utilities; (5) Information; (6) Financial Activities; (7) Professional and Business Services; (8) Educational and Health Services; (9) Leisure and Hospitality; (10) Other Services; and (11) Government. The Other Services group includes repair and maintenance, personal services, religious and grant making services, and services related to the operation of a private household. The Government group includes all civilian employees of federal, state, and local government, regardless of the activity in which employees are engaged.

The Inventory also uses Land Use Categories, as discussed above, to organize data for land use policy making purposes. *Table 1.2* illustrates the correspondence between NAICS industrial sectors and San Francisco's Land Use Activity Categories.

Table 1.1

MAJOR INDUSTRY CLASSIFICATION CATEGORIES

Industry Grouping and Sector Number (San Francisco Department of Planning and Economic Development)	County (through existing classification system)		
	SAN	County	Industry
1. Farm	1	11	Agriculture, Forestry, Fishing and Hunting
2. Natural Resources, Mining and Construction	2	21	Mining
	3	23	Construction
3. Manufacturing	4	31-33	Manufacturing
4. Trade, Transportation, Utilities	5	48-49	Transportation and Warehousing
	6	22	Utilities
	8	42	Wholesale Trade
	9	44-45	Retail Trade
5. Information	7	51	Information
6. Financial Activities	10	52	Finance and Insurance
	11	53	Real Estate and Rental and Leasing
7. Professional and Business Services	12	54	Professional, Scientific, and Technical Services
	13	55	Management of Companies and Enterprises
	14	56	Administrative and Support, Waste Management and Remediation Services
8. Educational and Health Services	15	61	Education Services
	16	62	Health Care and Social Assistance
	17	71	Arts, Entertainment, and Recreation
9. Leisure and Hospitality	18	72	Accommodation and Food Services
10. Other Services	19	81	Other Services (except Public Administration)
11. Government	20	92	Public Administration

Note: S N = Sector Number

Sources: Executive Office of The President; Office of the Management and Budget; San Francisco Planning Department

Table 1.2
CLASSIFICATION BY LAND USE CATEGORIES AND INDUSTRY GROUPS

San Francisco Planning Department Land Use Category	Industry Group	North American Industry Classification Manual Code
Office	Agriculture	111-116
	Finance	211-213
	Insurance	522-523
<i>Examples:</i>	Real Estate	524-526
Headquarter offices, professional services, branch banks		531, 533
		518
		518
	Office Services	519
		541
		551
		561
	Public Administration	921-928
Retail	General Merchandise	452
	Food Stores	445
	Apparel Stores	448
	Eating & Drinking Places	722
<i>Examples:</i>		441, 447
Stores, restaurants, bars, commercial parking lots		442
	Other Retail Stores	443, 446, 451
		453-454
		532
	Personal & Repair	811-812
Production/Distribution/Repair	Construction	236-238
		488
(PDR)		485, 487
	Transportation and Warehousing	484, 492-493
		491
		481, 483
<i>Examples:</i>		486
Warehouses, factories, workshops showrooms, port, television, telegraph, cable, satellite	Utilities	221
		562
		515
	Information	517
	Wholesale	423-425
	Food Manufacturing	311-312
	Apparel Manufacturing	313-315
	Printing and Publishing	323, 511
		321-322, 337
		324-325
	Other Manufacturing	316, 326-327
		331-333
		334-335
	Repair Services	336
	Transp. Equipment, Building Supplies	339, 444
	Film & Sound Recording	512
Hotel or Visitor	Accommodation	721
Cultural/Institutional/Educational	Art and Recreation	711
	Performing arts, amusement parks	713
(CIE)	Education Services	811
	Health Care	621, 623
<i>Examples:</i>	Social Assistance	624
Theaters, museums, hospitals, schools, libraries, churches	Other CIE Services	712
		813
Private Households	Private Households (Pvt HH)	814
	Unclassified Establishments	999

Sources:
Executive Office of The
President, Office of the
Management and Budget
San Francisco Planning
Department



2.0 Regional Overview

San Francisco has diverse linkages to the region as well as to the state, national, and global economy. This chapter supplies basic demographic and economic information about the San Francisco Bay Area's nine counties. This information gives an understanding of San Francisco's economic base within a regional and historical context.

The nine counties of the San Francisco Bay Area are Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano, and Sonoma. *Map 2.1* shows the location of these counties, which have been grouped into four sub-regions for analysis in this chapter: North Bay, East Bay, South Bay, and San Francisco. These sub-regions were initially identified in 1985 on the basis of observed travel patterns of commuters into San Francisco and availability of employment information. Although travel patterns have evolved since the initial observations, these sub-regions have been retained in order to maintain the consistency of the time series data in this chapter. The North Bay includes Marin, Sonoma, Napa, and Solano counties. The East Bay includes Contra Costa and Alameda counties. The South Bay includes Santa Clara and San Mateo counties.

The regional subdivision allows comparisons between San Francisco, North Bay, East Bay, and South Bay areas that represent the labor force base for San Francisco and the region. When reviewing the tables in this chapter, it is important to note that the Bay Area covers 7,041 square miles in total. The North Bay represents 53 percent of that total, the East Bay 21 percent, the South

Bay 25 percent, and San Francisco less than one percent of land area in the region. Population densities in San Francisco are by far the highest in the Bay Area.

This chapter presents two sets of tables and graphs. The first set describes the residents of each subregion regardless of where they work in terms of population, labor force, number of employed residents, and unemployment. These concepts are described below. For context, unemployment data is also provided for California and the United States. The second set describes the workers in each subregion regardless of where they live in terms of regional employment by industry groups and then regional employment by subregion by industry group.

Each economic indicator is reported in absolute numbers, annual percentage distribution, and percentage change over time. Unemployment figures are presented in terms of average annual rates.

- **Population** is defined as the total number of people who live in a specific area, such as a particular county or city. Population data comes from the California State Department of Finance (DoF). These data are based on the 2010 Census numbers with yearly updates which take into account city/county surveys of building permits, construction activity, and overall housing stock; tallying of administrative records from local, state, and federal agencies including driver's license data, school registration, and birth and death certificate records; and tracking the status of military bases. The DoF population estimates are generally 3% to 5% higher than those of the Census Bureau.

- **Labor Force** consists of persons who are either working or looking for work, excluding members of the armed forces. Labor force data are based on place of residence. For example, a worker who lives in the East Bay is part of the East Bay labor force, no matter where he or she is employed. Labor force data are obtained from the California Employment Development Department (EDD).
- **Employment**, as used in this inventory and defined by EDD, includes persons who were either at work or temporarily absent from work due to illness, vacation, strike, or other personal reasons. Employment data are collected by place of work. Someone holding a job in San Francisco is part of the San Francisco employment pool no matter where he or she lives. These data do not include self-employed, unpaid family workers, domestics, volunteers, or persons involved in trade disputes.
- **Unemployment** is defined as civilians 16 years and older, not at work, who were actively looking for work during the last four weeks, and were available to accept a job or who were waiting to be called back to jobs from which they had been laid off. Civilian unemployment data are based on place of residence. The unemployment data are from EDD, the United States Department of Commerce, and U.S. Census Bureau.

Employment data reported by industry group are based on EDD data. These data are organized by using the North American Industry Classification System (NAICS), as discussed in Chapter 1.



Bay Area Counties and
Commerce and Industry Sub-Regions



Table is Figure 2.1.1

BAY AREA POPULATION BY SUB-REGION, 2005–2014

This table presents the number of residents in each Bay Area sub-region for the last ten years, as well as the percentage distribution in any given year across the Bay Area and the annual change within each sub-region. Population trends are shown in Figure 2.1.1 below.

Population by Sub-Region (000s)

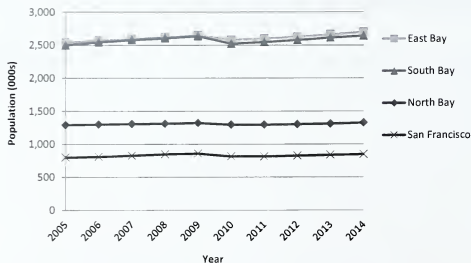
Sub-Region	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
North Bay	1,290.6	1,298.5	1,305.3	1,309.5	1,320.7	1,294.0	1,293.8	1,301.2	1,309.8	1,325.1
East Bay	2,539.7	2,568.5	2,594.7	2,617.1	2,647.9	2,577.2	2,597.3	2,623.4	2,660.3	2,697.4
South Bay	2,497.4	2,541.6	2,576.5	2,603.5	2,635.2	2,522.1	2,545.9	2,577.9	2,613.8	2,642.8
San Francisco	798.7	808.8	824.5	845.6	856.1	812.1	812.5	825.1	836.6	845.6
TOTAL	7,036.2	7,126.3	7,217.4	7,375.7	7,459.9	7,205.4	7,249.6	7,327.6	7,420.5	7,510.9

Annual Percentage Distribution

Sub-Region	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
North Bay	18.3	18.2	18.1	17.8	17.7	18.0	17.8	17.8	17.7	17.6
East Bay	36.1	36.0	36.0	35.5	35.5	35.8	35.8	35.8	35.9	35.9
South Bay	35.5	35.7	35.7	35.3	35.3	35.0	35.1	35.2	35.2	35.2
San Francisco	11.4	11.4	11.4	11.5	11.5	11.3	11.2	11.3	11.3	11.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Sub-Region	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
North Bay	0.6	0.5	0.3	0.9	-2.0	0.0	0.6	0.7	1.2
East Bay	1.1	1.0	0.9	1.2	-2.7	0.8	1.0	1.4	1.4
South Bay	1.8	1.4	1.0	1.2	-4.3	0.9	1.3	1.4	1.1
San Francisco	1.3	1.9	2.6	1.2	-5.1	0.1	1.5	1.4	1.1
TOTAL	1.3	1.3	2.2	1.1	-3.4	0.6	1.1	1.3	1.2

**Notes:**

- North Bay: Marin, Napa, Sonoma, and Solano counties
- East Bay: Contra Costa and Alameda counties
- South Bay: Santa Clara and San Mateo counties
- San Francisco: City and County of San Francisco

Source:

US Census, CA Department of Finance, E-1 City / County Population Estimates.

Table & Figure 2.1.2

BAY AREA LABOR FORCE BY SUB-REGION, 2005–2014

This table presents the number of residents in the labor force in each Bay Area sub-region for the last ten years. Also included is the percentage distribution in any given year across the Bay Area and the annual change within each sub region. Labor force trends are shown in Figure 2.1.2 below.

Residents in the Labor Force by Sub-Region (000s)

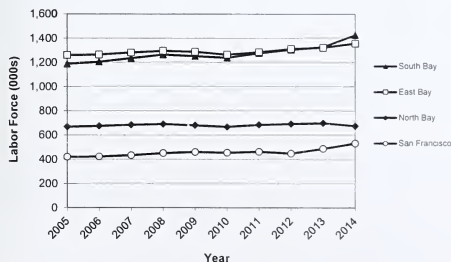
Sub-Region	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
North Bay	668.3	674.9	684.3	690.4	679.9	668.1	684.6	692.0	698.5	676.3
East Bay	1,259.7	1,265.2	1,281.5	1,295.7	1,288.6	1,264.5	1,285.0	1,311.7	1,322.0	1,356.9
South Bay	1,187.5	1,204.9	1,234.7	1,264.3	1,252.0	1,238.7	1,276.5	1,305.3	1,326.8	1,426.9
San Francisco	420.5	422.5	433.3	450.4	459.8	453.8	462.5	447.6	487.2	532.4
TOTAL	3,591.7	3,546.6	3,536.0	3,567.5	3,680.3	3,625.1	3,708.6	3,756.6	3,834.5	3,992.5

Annual Percentage Distribution

Sub-Region	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
North Bay	18.6	19.1	19.4	19.4	18.5	18.4	18.5	18.4	18.2	16.9
East Bay	35.1	35.7	36.2	36.3	35.0	34.9	34.6	34.9	34.5	34.0
South Bay	33.1	34.0	34.9	35.4	34.0	34.2	34.4	34.7	34.6	35.7
San Francisco	11.7	11.9	12.3	12.6	12.5	12.5	12.5	11.9	12.7	13.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Sub-Region	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
North Bay	1.0	1.4	0.9	-1.5	-1.7	2.5	1.1	0.9	-3.2
East Bay	0.4	1.3	1.1	-0.5	-1.9	1.6	2.1	0.8	2.6
South Bay	1.5	2.5	2.4	-1.0	-1.1	3.1	2.3	1.6	7.5
San Francisco	0.5	2.6	3.9	2.1	-1.3	1.9	-3.2	8.8	9.3
TOTAL	-1.4	-0.1	0.9	3.2	-1.5	2.3	1.3	2.1	4.1



Notes:

- North Bay: Marin, Napa, Sonoma, and Solano counties
- East Bay: Contra Costa and Alameda counties
- South Bay: Santa Clara and San Mateo counties
- San Francisco: City and County of San Francisco

Source: CA Employment Development Department, annual averages (not seasonally adjusted)

Table & Figure 2.1.3

BAY AREA EMPLOYED RESIDENTS BY SUB-REGION, 2005-2014

This table presents the number of employed residents in each Bay Area sub-region for the last ten years. Also included is the percentage distribution in any given year across the Bay Area and the annual change within each sub-region. Employment trends are shown in Figure 2.1.3 below.

Employed Residents by Sub-Region (000s)

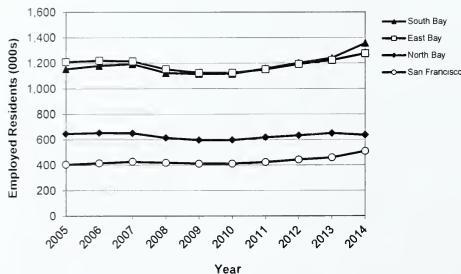
Sub-Region	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
North Bay	646.7	653.2	650.3	614.7	596.8	596.8	617.9	633.1	650.5	636.7
East Bay	1,209.7	1,220.6	1,215.5	1,153.0	1,124.4	1,124.4	1,151.6	1,193.5	1,224.1	1,275.7
South Bay	1,153.7	1,179.7	1,193.3	1,123.6	1,116.4	1,116.4	1,159.5	1,202.2	1,241.9	1,357.0
San Francisco	404.7	414.6	426.7	418.4	410.7	410.7	422.7	442.8	459.3	509.1
TOTAL	3,335.4	3,359.6	3,414.8	3,309.7	3,248.3	3,248.3	3,351.7	3,471.6	3,575.8	3,778.5

Annual Percentage Distribution

Sub-Region	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
North Bay	19.4	19.4	19.0	18.6	18.4	18.4	18.4	18.2	18.2	16.9
East Bay	36.3	36.3	35.6	34.8	34.6	34.6	34.4	34.4	34.2	33.8
South Bay	34.6	35.1	34.9	33.9	34.4	34.4	34.6	34.6	34.7	35.9
San Francisco	12.1	12.3	12.5	12.6	12.6	12.6	12.6	12.8	12.8	13.5
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Sub-Region	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
North Bay	1.0	-0.4	-5.5	-2.9	0.0	3.5	2.5	2.7	-2.1
East Bay	0.9	-0.4	-5.1	-2.5	0.0	2.4	3.6	2.6	4.2
South Bay	2.3	1.2	-5.8	-0.6	0.0	3.9	3.7	3.3	9.3
San Francisco	2.4	2.9	-1.9	-1.8	0.0	2.9	4.8	3.7	10.8
TOTAL	0.7	1.6	-3.1	-1.9	0.0	3.2	3.6	3.0	5.7

**Notes:**

- North Bay: Marin, Napa, Sonoma, and Solano counties
- East Bay: Contra Costa and Alameda counties
- South Bay: Santa Clara and San Mateo counties
- San Francisco: City and County of San Francisco

Source:

CA Employment Development Department, annual averages (not seasonally adjusted).

Table 2.1.4

BAY AREA UNEMPLOYMENT BY SUB-REGION, 2005–2014

This table presents the number of unemployed residents in each Bay Area sub-region for the last ten years. Also included is the percentage distribution in any given year across the Bay Area and the annual change within each sub-region. Finally, this table also includes unemployment rates over the last ten years for each sub-region, as well as for California and the United States to provide context. Unemployment rate trends are shown in Figure 2.1.4 on the following page.

Unemployment by Sub-Region (000s)

Sub-Region	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
North Bay	30.7	28.2	31.1	39.9	65.3	69.8	66.6	59.0	47.9	39.6
East Bay	63.5	55.5	60.9	80.1	135.6	140.2	133.4	118.2	97.8	81.2
South Bay	60.7	51.2	55.0	70.9	128.4	122.2	117.0	103.1	85.0	69.9
San Francisco	21.5	17.8	18.7	23.7	41.5	43.2	39.8	34.9	27.9	23.3
TOTAL	176.4	152.7	165.7	214.6	370.8	375.4	356.8	315.2	258.6	214.0

Annual Percentage Distribution

Sub-Region	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
North Bay	17.4	18.5	18.8	18.6	17.6	18.6	18.7	18.7	18.5	18.5
East Bay	36.0	36.3	36.8	37.3	36.6	37.3	37.4	37.5	37.8	37.9
South Bay	34.4	33.5	33.2	33.0	34.6	32.6	32.8	32.7	32.9	32.7
San Francisco	12.2	11.7	11.3	11.0	11.2	11.5	11.2	11.1	10.8	10.9
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Sub-Region	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
North Bay	-8.1	10.3	28.3	63.7	6.9	-4.6	-11.4	-18.8	-17.3
East Bay	-12.6	9.7	31.5	69.3	3.4	-4.9	-11.4	-17.3	-17.0
South Bay	-15.7	7.4	28.9	81.1	-4.8	-4.3	-11.9	-17.6	-17.8
San Francisco	-17.2	5.1	26.7	75.1	4.1	-7.9	-12.3	-20.1	-16.5
TOTAL	-13.4	8.5	29.5	72.8	1.2	-5.0	-11.7	-18.0	-17.2

Average Annual Rate

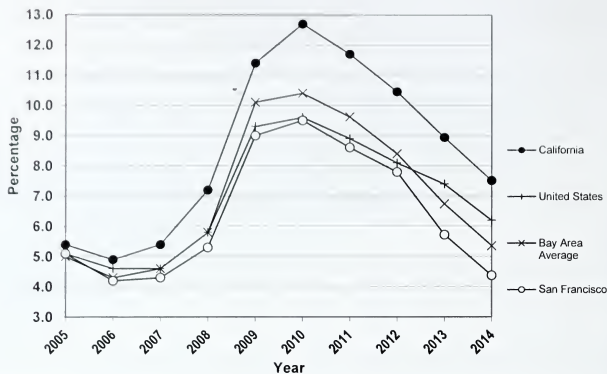
Sub-Region	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
North Bay	4.6	4.2	4.5	5.8	9.6	10.4	9.7	8.5	6.9	5.9
East Bay	5.0	4.4	4.8	6.2	10.5	11.1	10.4	9.0	7.4	6.0
South Bay	5.1	4.2	4.5	5.6	10.3	9.9	9.2	7.9	6.4	4.9
San Francisco	5.1	4.2	4.3	5.3	9.0	9.5	8.6	7.8	5.7	4.4
Average	5.0	4.3	4.6	5.8	10.1	10.4	9.6	8.4	6.7	5.4

Average Annual Rate

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
California	5.4	4.9	5.4	7.2	11.4	12.7	11.7	10.5	8.9	7.5
United States	5.1	4.6	4.6	5.8	9.3	9.6	8.9	8.1	7.4	6.2

Figure 2.1.4

BAY AREA UNEMPLOYMENT RATE BY SUB-REGION, 2005-2014



Notes:

- North Bay: Marin, Napa, Sonoma, and Solano counties
- East Bay: Contra Costa and Alameda counties
- South Bay: Santa Clara and San Mateo counties
- San Francisco: City and County of San Francisco

Sources:

- CA Employment Development Department, annual averages (not seasonally adjusted).
- US Bureau of Labor Statistics; http://www.bls.gov/cps/prev_yrs.htm

Table 2.2.1 BAY AREA EMPLOYMENT BY INDUSTRY GROUP, 2005–2014

This table presents information about those who work in the Bay Area. It conveys the number of people working in each industry group. The breakdown for each Bay Area sub-region is presented in Tables 2.2.2–2.2.4. All tables utilize NAICS industrial categories for the entire period of analysis.

Number of Jobs (000s)

Industry Group	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Farm	22.5	20.2	20.6	20.2	20.1	19.0	18.7	18.9	20.0	20.2
Natural Resources, Mining & Construction	194.2	196.0	194.7	179.6	143.7	131.5	110.3	116.1	154.4	163.1
Manufacturing	353.8	352.0	345.0	344.9	313.9	305.4	310.5	312.1	310.9	320.9
Trade, Transportation & Utilities	562.5	564.1	571.3	563.5	518.6	509.2	513.3	527.8	547.5	562.1
Information	112.4	112.5	113.3	114.5	110.7	110.8	117.2	122.4	136.2	148.5
Financial Activities	213.3	213.4	206.1	193.5	179.3	170.4	170.4	175.0	173.9	177.2
Professional & Business Services	529.7	549.8	572.4	588.6	542.6	546.5	560.9	605.8	642.1	682.2
Educational & Health Services	362.3	373.1	380.0	391.4	394.5	409.7	415.0	425.2	520.7	540.2
Leisure & Hospitality	312.3	322.0	329.9	335.7	322.0	323.1	333.1	352.2	374.0	391.4
Other Services	110.4	109.8	111.5	112.5	107.2	108.8	110.3	112.9	117.0	121.5
Government	471.1	473.2	485.8	477.7	472.5	454.5	449.8	447.7	450.2	458.3
TOTAL	3,244.5	3,286.1	3,330.6	3,322.1	3,125.1	3,088.9	3,109.5	3,216.1	3,446.9	3,585.6

Annual Percentage Distribution

Industry Group	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Farm	0.7	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6
Natural Resources, Mining & Construction	6.0	6.0	5.8	5.4	4.6	4.3	3.5	3.6	4.5	4.5
Manufacturing	10.9	10.7	10.4	10.4	10.0	9.9	10.0	9.7	9.0	8.9
Trade, Transportation & Utilities	17.3	17.2	17.2	17.0	16.6	16.5	16.5	16.4	15.9	15.7
Information	3.5	3.4	3.4	3.4	3.5	3.6	3.8	3.8	4.0	4.1
Financial Activities	6.6	6.5	6.2	5.8	5.7	5.5	5.5	5.4	5.0	4.9
Professional & Business Services	16.3	16.7	17.2	17.7	17.4	17.7	18.0	18.8	18.6	19.0
Educational & Health Services	11.2	11.4	11.4	11.8	12.6	13.3	13.3	13.2	15.1	15.1
Leisure & Hospitality	9.6	9.8	9.9	10.1	10.3	10.5	10.7	11.0	10.9	10.9
Other Services	3.4	3.3	3.3	3.4	3.4	3.5	3.5	3.5	3.4	3.4
Government	14.5	14.4	14.6	14.4	15.1	14.7	14.5	13.9	13.1	12.8
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
Farm	-10.2	2.0	-1.9	-0.5	-5.5	-1.6	1.1	5.8	1.0
Natural Resources, Mining & Construction	0.9	-0.7	-7.8	-20.0	-8.5	-16.1	5.3	33.0	5.6
Manufacturing	-0.5	-2.0	0.0	-9.0	-2.7	1.7	0.5	-0.4	3.2
Trade, Transportation & Utilities	0.3	1.3	-1.4	-8.0	-1.8	0.8	2.8	3.7	2.7
Information	0.1	0.7	1.1	-3.3	0.1	5.8	4.4	11.3	9.0
Financial Activities	0.0	-3.4	-6.1	-7.3	-5.0	0.0	2.7	-0.6	1.9
Professional & Business Services	3.8	4.1	2.8	-7.8	0.7	2.6	8.0	6.0	6.2
Educational & Health Services	3.0	1.8	3.0	0.8	3.9	1.3	2.5	22.5	3.7
Leisure & Hospitality	3.1	2.5	1.8	-4.1	0.3	3.1	5.7	6.2	4.7
Other Services	-0.5	1.5	0.9	-4.7	1.5	1.4	2.4	3.6	3.8
Government	0.4	2.7	-1.7	-1.1	-3.8	-1.0	-0.5	0.6	1.8
TOTAL	1.3	1.4	-0.3	-5.9	-1.2	0.7	3.4	7.2	4.6

Source: California Employment Development Department, Industry Employment & Labor Force - by Annual Average, March Benchmark

Table 2.2.2

BAY AREA EMPLOYMENT BY INDUSTRY GROUP AND SUB-REGION, 2005–2014 – NUMBER OF JOBS

This table contains the disaggregation of Table 2.2.1 by Bay Area sub-regions.

Total Number of Jobs (000s)

Sub-Region	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
North Bay	497.0	501.9	503.4	497.8	467.3	459.2	453.8	461.9	497.0	514.2
East Bay	1,035.7	1,047.8	1,049.5	1,031.1	968.0	949.8	950.6	978.7	1,035.4	1,066.3
South Bay	1,202.6	1,215.5	1,238.2	1,243.8	1,165.5	1,158.2	1,178.6	1,217.6	1,305.9	1,365.6
San Francisco	509.2	520.9	539.5	549.4	524.3	521.7	526.5	557.9	608.6	639.5
Regional Total	3,244.5	3,286.1	3,330.6	3,322.1	3,125.1	3,088.9	3,109.5	3,216.1	3,446.9	3,585.6

Farm

North Bay	12.5	12.7	13.1	12.8	12.9	12.0	12.0	12.4	13.3	13.5
East Bay	1.5	1.5	1.6	1.4	1.5	1.5	1.5	1.4	1.5	1.4
South Bay	8.4	5.7	5.7	5.7	5.4	5.3	5.0	4.9	5.0	5.1
San Francisco	0.1	0.3	0.2	0.3	0.3	0.2	0.2	0.2	0.2	0.2
Regional Total	22.5	20.2	20.6	20.2	20.1	19.0	18.7	18.9	20.0	20.2

Natural Resources, Mining & Construction

North Bay	41.6	41.0	38.5	34.5	26.8	24.6	16.9	17.0	27.7	29.2
East Bay	75.1	74.6	73.6	65.8	54.7	48.7	48.5	50.6	57.3	59.5
South Bay	60.8	62.9	64.3	60.9	46.9	44.1	30.8	34.4	53.7	57.6
San Francisco	16.7	17.5	18.3	18.4	15.3	14.1	14.1	14.8	15.7	16.8
Regional Total	194.2	196.0	194.7	179.6	143.7	131.5	110.3	116.8	154.4	163.1

Manufacturing

North Bay	46.8	46.6	45.8	45.5	42.0	41.3	41.8	42.9	44.1	47.0
East Bay	95.4	96.9	93.7	93.3	82.5	78.6	79.1	80.3	78.6	81.9
South Bay	199.8	197.4	194.4	195.3	180.1	176.8	181.0	179.6	179.0	182.0
San Francisco	11.8	11.1	11.1	10.8	9.3	8.7	8.6	8.6	8.6	8.6
Regional Total	353.8	352.0	345.0	344.9	313.9	305.4	310.5	311.4	310.3	319.5

Trade, Transportation & Utilities

North Bay	90.1	90.6	91.3	89.4	82.3	82.2	83.4	85.4	87.8	90.6
East Bay	195.2	195.4	198.1	195.3	179.0	173.8	174.0	179.0	185.4	191.2
South Bay	207.2	208.4	212.7	210.9	193.7	191.2	193.5	198.4	204.9	208.7
San Francisco	70.0	69.7	69.2	67.9	63.6	62.0	62.4	65.0	69.4	71.6
Regional Total	562.5	564.1	571.3	563.5	518.6	509.2	513.3	527.8	547.5	562.1

Information

North Bay	9.1	7.7	7.7	7.4	7.0	6.6	6.8	7.1	7.2	7.0
East Bay	30.4	29.8	29.4	27.8	25.1	23.8	22.7	22.0	21.5	21.1
South Bay	55.3	56.9	56.8	60.2	59.1	61.2	66.8	69.6	82.2	92.5
San Francisco	17.6	18.1	19.4	19.1	19.5	19.2	20.9	23.7	25.3	27.9
Regional Total	112.4	112.5	113.3	114.5	110.7	110.8	117.2	122.4	136.2	148.5

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Financial Activities

Sub-Region	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
North Bay	27.9	28.0	26.5	24.3	22.8	21.4	22.1	21.8	22.1	21.5
East Bay	70.5	69.0	62.3	56.7	52.6	48.4	47.2	48.4	49.5	49.3
South Bay	57.4	58.4	58.3	54.8	50.5	49.0	50.8	53.3	53.4	55.5
San Francisco	57.5	58.0	59.0	57.7	53.4	51.6	50.3	51.5	48.9	50.9
Regional Total	213.3	213.4	206.1	193.5	179.3	170.4	170.4	175.0	173.9	177.2

Professional & Business Services

North Bay	55.4	58.8	60.2	59.9	53.9	56.7	53.1	51.2	53.9	54.5
East Bay	150.6	155.0	155.5	161.4	148.5	148.1	154.3	165.0	172.3	179.9
South Bay	218.9	225.0	239.4	242.2	221.9	221.7	232.8	250.7	261.2	278.0
San Francisco	104.8	111.0	117.3	125.1	118.3	120.0	120.7	138.9	154.7	169.8
Regional Total	529.7	549.8	572.4	588.6	542.6	546.5	560.9	605.8	642.1	682.2

Educational & Health Services

North Bay	62.1	63.0	64.2	66.2	66.4	67.4	67.4	70.0	81.7	85.6
East Bay	118.6	121.9	124.7	127.7	130.0	139.7	137.5	141.1	170.9	175.1
South Bay	127.0	132.2	133.6	139.4	140.2	144.0	151.1	153.0	183.1	192.5
San Francisco	54.6	56.0	57.5	58.1	57.9	58.6	59.0	61.1	85.0	87.0
Regional Total	362.3	373.1	380.0	391.4	394.5	409.7	415.0	425.2	520.7	540.2

Leisure & Hospitality

North Bay	54.2	54.9	56.3	57.0	54.6	54.2	56.3	59.8	62.7	66.5
East Bay	82.6	85.7	87.5	89.1	85.2	85.6	87.3	92.0	98.0	103.1
South Bay	103.7	107.4	109.7	111.0	106.5	106.8	110.6	117.7	125.6	131.7
San Francisco	71.8	74.0	76.4	78.6	75.7	76.5	78.9	82.7	87.7	90.1
Regional Total	312.3	322.0	329.9	335.7	322.0	323.1	333.1	352.2	374.0	391.4

Other Services

North Bay	16.8	17.0	17.0	17.4	16.3	16.5	16.3	17.2	17.8	17.9
East Bay	35.8	35.9	36.2	36.0	34.3	34.5	36.0	36.1	37.0	37.7
South Bay	36.1	35.5	36.4	36.8	35.3	36.3	36.1	37.1	38.3	39.9
San Francisco	21.7	21.4	21.9	22.3	21.3	21.5	21.9	22.5	23.9	26.0
Regional Total	110.4	109.8	111.5	112.5	107.2	108.8	110.3	112.9	117.0	121.5

Government

North Bay	80.5	81.6	82.8	83.4	82.3	76.3	77.7	77.1	78.7	80.9
East Bay	180.0	182.1	186.9	176.6	174.6	167.1	162.5	162.8	163.4	166.1
South Bay	128.0	125.7	126.9	126.6	125.9	121.8	120.1	118.9	119.5	122.1
San Francisco	82.6	83.8	89.2	91.1	89.7	89.3	89.5	88.9	88.6	89.2
Regional Total	471.1	473.2	485.8	477.7	472.5	454.5	449.8	447.7	450.2	458.3

Source: California Employment Development Department, Industry Employment & Labor Force - by Annual Average

Table 2.2.3

BAY AREA EMPLOYMENT BY INDUSTRY GROUP AND SUB-REGION, 2005-2014 – ANNUAL PERCENTAGE DISTRIBUTION

This table contains the percentage distribution across the Bay Area of the industry group data from Table 2.2.2.

Total Annual Percentage Distribution

Sub-Region	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
North Bay	15.3	15.3	15.1	15.0	15.0	14.9	14.6	14.4	14.4	14.3
East Bay	31.9	31.9	31.5	31.0	31.0	30.7	30.6	30.4	30.0	29.7
South Bay	37.1	37.0	37.2	37.4	37.3	37.5	37.9	37.9	37.9	38.1
San Francisco	15.7	15.9	16.2	16.5	16.8	16.9	16.9	17.3	17.7	17.8
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Farm

North Bay	55.6	62.9	63.6	63.4	64.2	63.2	64.2	65.6	66.5	66.8
East Bay	6.7	7.4	7.8	6.9	7.5	7.9	8.0	7.4	7.5	6.9
South Bay	37.3	28.2	27.7	28.2	26.9	27.9	26.7	25.9	25.0	25.2
San Francisco	0.4	1.5	1.0	1.5	1.5	1.1	1.1	1.1	1.0	1.0
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Natural Resources, Mining & Construction

North Bay	21.4	20.9	19.8	19.2	18.6	18.7	15.3	14.6	17.9	17.9
East Bay	38.7	38.1	37.8	36.6	38.1	37.0	44.0	43.3	37.1	36.5
South Bay	31.3	32.1	33.0	33.9	32.6	33.5	27.9	29.5	34.8	35.3
San Francisco	8.6	8.9	9.4	10.2	10.6	10.7	12.8	12.7	10.2	10.3
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Manufacturing

North Bay	13.2	13.2	13.3	13.2	13.4	13.5	13.5	13.8	14.2	14.7
East Bay	27.0	27.5	27.2	27.1	26.3	25.7	25.5	25.8	25.3	25.6
South Bay	56.5	56.1	56.3	56.6	57.4	57.9	58.3	57.7	57.7	57.0
San Francisco	3.3	3.2	3.2	3.1	3.0	2.8	2.8	2.8	2.8	2.7
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Trade, Transportation & Utilities

North Bay	16.0	16.1	16.0	15.9	15.9	16.1	16.2	16.2	16.0	16.1
East Bay	34.7	34.6	34.7	34.7	34.5	34.1	33.9	33.9	33.9	34.0
South Bay	36.8	36.9	37.2	37.4	37.4	37.5	37.7	37.6	37.4	37.1
San Francisco	12.4	12.4	12.1	12.0	12.3	12.2	12.2	12.3	12.7	12.7
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Information

North Bay	8.1	6.8	6.8	6.5	6.3	6.0	5.8	5.8	5.3	4.7
East Bay	27.0	26.5	25.9	24.3	22.7	21.5	19.4	18.0	15.8	14.2
South Bay	49.2	50.6	50.1	52.6	53.4	55.2	57.0	56.9	60.4	62.3
San Francisco	15.7	16.1	17.1	16.7	17.6	17.3	17.8	19.4	18.6	18.8
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

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Financial Activities

Sub-Region	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
North Bay	13.1	13.1	12.9	12.6	12.7	12.6	13.0	12.5	12.7	12.1
East Bay	33.1	32.3	30.2	29.3	29.3	28.4	27.7	27.7	28.5	27.8
South Bay	26.9	27.4	28.3	28.3	28.2	28.8	29.8	30.5	30.7	31.3
San Francisco	27.0	27.2	28.6	29.8	29.8	30.3	29.5	29.4	28.1	28.7
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Professional & Business Services

North Bay	10.5	10.7	10.5	10.2	9.9	10.4	9.5	8.5	8.4	8.0
East Bay	28.4	28.2	27.2	27.4	27.4	27.1	27.5	27.2	26.8	26.4
South Bay	41.3	40.9	41.8	41.1	40.9	40.6	41.5	41.4	40.7	40.8
San Francisco	19.8	20.2	20.5	21.3	21.8	22.0	21.5	22.9	24.1	24.9
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Educational & Health Services

North Bay	17.1	16.9	16.9	16.9	16.8	16.5	16.2	16.5	15.7	15.8
East Bay	32.7	32.7	32.8	32.6	33.0	34.1	33.1	33.2	32.8	32.4
South Bay	35.1	35.4	35.2	35.6	35.5	35.1	36.4	36.0	35.2	35.6
San Francisco	15.1	15.0	15.1	14.8	14.7	14.3	14.2	14.4	16.3	16.1
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Leisure & Hospitality

North Bay	17.4	17.0	17.1	17.0	17.0	16.8	16.9	17.0	16.8	17.0
East Bay	26.4	26.6	26.5	26.5	26.5	26.5	26.2	26.1	26.2	26.3
South Bay	33.2	33.4	33.3	33.1	33.1	33.1	33.2	33.4	33.6	33.6
San Francisco	23.0	23.0	23.2	23.4	23.5	23.7	23.7	23.5	23.4	23.0
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Other Services

North Bay	15.2	15.5	15.2	15.5	15.2	15.2	14.8	15.2	15.2	14.7
East Bay	32.4	32.7	32.5	32.0	32.0	31.7	32.6	32.0	31.6	31.0
South Bay	32.7	32.3	32.6	32.7	32.9	33.4	32.7	32.9	32.7	32.8
San Francisco	19.7	19.5	19.6	19.8	19.9	19.8	19.9	19.9	20.4	21.4
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Government

North Bay	17.1	17.2	17.0	17.5	17.4	16.8	17.3	17.2	17.5	17.7
East Bay	38.2	38.5	38.5	37.0	37.0	36.8	36.1	36.4	36.3	36.2
South Bay	27.2	26.6	26.1	26.5	26.6	26.8	26.7	26.6	26.5	26.6
San Francisco	17.5	17.7	18.4	19.1	19.0	19.6	19.9	19.9	19.7	19.5
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source: California Employment Development Department, Industry Employment & Labor Force - by Annual Average

Table 2.2.4

BAY AREA EMPLOYMENT BY INDUSTRY GROUP AND SUB-REGION, 2005-2014 – PERCENTAGE CHANGE

This table contains the annual percentage change in employment by industry group within each sub-region of the Bay Area.

Total Percentage Change

Sub-Region	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
North Bay	1.0	0.3	-1.1	-6.1	-1.7	-1.2	1.8	7.6	3.5
East Bay	1.2	0.2	-1.8	-6.1	-1.9	0.1	3.0	5.8	3.0
South Bay	1.1	1.9	0.5	-6.3	-0.6	1.8	3.3	7.3	4.6
San Francisco	2.3	3.6	1.8	-4.6	-0.5	0.9	6.0	9.1	5.1
Regional Total	1.3	1.4	-0.3	-5.9	-1.2	0.7	3.4	7.2	4.0

Farm

North Bay	1.6	3.1	-2.3	0.8	-7.0	0.0	3.3	7.3	1.5
East Bay	0.0	6.7	-12.5	7.1	0.0	0.0	-6.7	7.1	-6.7
South Bay	-32.1	0.0	0.0	-5.3	-1.9	-5.7	-2.0	2.0	2.0
San Francisco	200.0	-33.3	50.0	0.0	-33.3	0.0	0.0	0.0	0.0
Regional Total	-10.2	2.0	-1.9	-0.5	-5.5	-1.6	1.1	5.8	1.0

Natural Resources, Mining & Construction

North Bay	-1.4	-6.1	-10.4	-22.3	-8.2	-31.3	0.6	62.9	5.4
East Bay	-0.7	-1.3	-10.6	-16.9	-11.0	-0.4	4.3	13.2	3.8
South Bay	3.5	2.2	-5.3	-23.0	-6.0	-30.2	11.7	56.1	7.3
San Francisco	4.8	4.6	0.5	-16.8	-7.8	0.0	0.0	0.0	7.0
Regional Total	0.9	-0.7	-7.8	-20.0	-8.5	-16.1	5.9	32.2	5.6

Manufacturing

North Bay	-0.4	-1.7	-0.7	-7.7	-1.7	1.2	2.6	2.8	6.6
East Bay	1.6	-3.3	-0.4	-11.6	-4.7	0.6	1.5	-2.1	4.2
South Bay	-1.2	-1.5	0.5	-7.8	-1.8	2.4	-0.8	-0.3	1.7
San Francisco	-5.9	0.0	-2.7	-13.9	-6.5	-1.1	0.0	0.0	0.0
Regional Total	-0.5	-2.0	0.0	-9.0	-2.7	1.7	0.3	-0.4	3.0

Trade, Transportation & Utilities

North Bay	0.6	0.8	-2.1	-7.9	-0.1	1.5	2.4	2.8	3.2
East Bay	0.1	1.4	-1.4	-8.3	-2.9	0.1	2.9	3.6	3.1
South Bay	0.6	2.1	-0.8	-8.2	-1.3	1.2	2.5	3.3	1.9
San Francisco	-0.4	-0.7	-1.9	-6.3	-2.5	0.6	4.2	6.8	3.2
Regional Total	0.3	1.3	-1.4	-8.0	-1.8	0.8	2.8	3.7	2.7

Information

North Bay	-15.4	0.0	-3.9	-5.4	-5.7	3.0	4.4	1.4	-2.8
East Bay	-2.0	-1.3	-5.4	-9.7	-5.2	-4.6	-3.1	-2.3	-1.9
South Bay	2.9	-0.2	6.0	-1.8	3.6	9.2	4.2	18.1	12.5
San Francisco	2.8	7.2	-1.5	2.1	-1.5	8.9	13.4	6.8	10.3
Regional Total	0.1	0.7	1.1	-3.3	0.1	5.8	4.4	11.3	9.0

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Financial Activities

Sub-Region	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
North Bay	0.4	-5.4	-8.3	-6.2	-6.1	3.3	-1.4	1.4	2.7
East Bay	-2.1	-9.7	-9.0	-7.2	-8.0	-2.5	2.5	2.3	-0.4
South Bay	1.7	-0.2	-6.0	-7.8	-3.0	3.7	4.9	0.2	3.9
San Francisco	0.9	1.7	-2.2	-7.5	-3.4	-2.5	2.4	-5.0	4.1
Regional Total	0.0	-3.4	-6.1	-7.3	-5.0	0.0	2.7	-0.6	1.9

Professional & Business Services

North Bay	6.1	2.4	-0.5	-10.0	5.2	-6.3	-3.6	5.3	1.1
East Bay	2.9	0.3	3.8	-8.0	-0.3	4.2	6.9	4.4	4.4
South Bay	2.8	6.4	1.2	-8.4	-0.1	5.0	7.7	4.2	6.4
San Francisco	5.9	5.7	6.6	-5.4	1.4	0.6	15.1	11.4	9.8
Regional Total	3.8	4.1	2.8	-7.8	0.7	2.6	8.0	6.0	6.2

Educational & Health Services

North Bay	1.4	1.9	3.1	0.3	1.5	0.0	3.9	16.7	4.8
East Bay	2.8	2.3	2.4	1.8	7.5	-1.6	2.6	21.1	2.5
South Bay	4.1	1.1	4.3	0.6	2.7	4.9	1.3	19.7	5.1
San Francisco	2.6	2.7	1.0	-0.3	1.2	0.7	3.6	39.1	2.4
Regional Total	3.0	1.8	3.0	0.8	3.9	1.3	2.5	22.5	3.7

Leisure & Hospitality

North Bay	1.3	2.6	1.2	-4.2	-0.7	3.9	6.2	4.8	6.1
East Bay	3.8	2.1	1.8	-4.4	0.5	2.0	5.4	6.5	5.2
South Bay	3.6	2.1	1.2	-4.1	0.3	3.6	6.4	6.7	4.9
San Francisco	3.1	3.2	2.9	-3.7	1.1	3.1	4.8	6.0	2.7
Regional Total	3.1	2.5	1.8	-4.1	0.3	3.1	5.7	6.2	4.7

Other Services

North Bay	1.2	0.0	2.4	-6.3	1.2	-1.2	5.5	3.5	0.6
East Bay	0.3	0.8	-0.6	-4.7	0.6	4.3	0.3	2.5	1.9
South Bay	-1.7	2.5	1.1	-4.1	2.8	-0.6	2.8	3.2	4.2
San Francisco	-1.4	2.3	1.8	-4.5	0.9	1.9	2.7	6.2	8.8
Regional Total	-0.5	1.5	0.9	-4.7	1.5	1.4	2.4	3.6	3.8

Government

North Bay	1.4	1.5	0.7	-1.3	-7.3	1.8	-0.8	2.1	2.8
East Bay	1.2	2.6	-5.5	-1.1	-4.3	-2.8	0.2	0.4	1.7
South Bay	-1.8	1.0	-0.2	-0.6	-3.3	-1.4	-1.0	0.5	2.2
San Francisco	1.5	6.4	2.1	-1.5	-0.4	0.2	-0.7	-0.3	0.7
Regional Total	0.4	2.7	-1.7	-1.1	-3.8	-1.0	-0.5	0.6	1.8

Source: California Employment Development Department, Industry Employment & Labor Force - by Annual Average



Photo by Luis Alvarez, "Floating reflections" June 14, 2006 via Flickr, Creative Commons Attribution

3.0 Employment

This chapter provides information about the employment trends in San Francisco from 2005 to 2014. The employment data presented in this chapter are based on the payroll jobs in San Francisco provided by the California Employment Development Department (EDD). The data are reported as annual average based on the quarterly average employment data. It is important to note that these employment data differ from the benchmark data provided by EDD on its web site (<http://www.labormarketinfo.edd.ca.gov>). The latter data omit private household employment data (NAICS 814) and are adjusted throughout the year. The NAICS 814 classification counts private households that engage in employing workers on or about the premises in activities primarily concerned with the operation of the household as distinct employment “establishments.” These household employees include cooks, maids, butlers, private caregivers, gardeners, grounds keeper/caretakers, and other household maintenance workers.

Employment data are presented by the major economy sectors under each type of land use category. Up until 2000, the C&I organized economic sectors according to the Standard Industrial Classification system (SIC). In 2001, these economic sectors were reorganized according to North American Industry Classification system (NAICS). The NAICS industry classification system is discussed in Section 1.2 – Data Formats. *Tables 1.1 and 1.2* show the NAICS economic sectors.

Employment is defined as number of employees who were either at work or temporarily absent from work due to illness, vacation, strike, or other personal reasons. Employment data are collected by place of work. A person holding a job in San Francisco is part of the San Francisco employment pool regardless of his or her place of residence. A person holding more than one job is counted separately for each job. Moreover, the EDD wage and salary employment data do not include self-employed persons, of which there were approximately 61,000 in 2005 according to the City of San Francisco's Office of the Treasurer and Tax Collector. The EDD wage and salary employment data also do not include unpaid family workers, volunteers, or persons involved in trade disputes.

Employment data is reported both for the entire city and the city's ten Commerce and Industry Districts under five Land Use categories - Office, Retail, Production/Distribution/Repair (PDR), Hotel, and Cultural/Institutional/Educational (CIE). Beginning in 2009, numbers are also available for Private Households (Pvt HH). For an explanation of Land Use Category and Commerce and Industry District, refer to Section 1.2 – Data Formats.

Employment data reported by land use category will not be consistent with C&I Inventories published before 2001. Public administration jobs have been included in different land use categories in previous C&I Inventories.

This publication includes public administration jobs in the Office land use category for all years; necessary adjustments were made to data from previous years. Public administration jobs were also classified as Office land uses in the 2001 publication. For C&I Inventories 2000 and earlier, public administration jobs were separated from Office, PDR, and CIE land use categories.

Table 3.1 shows employment data by Land Use Category from 2004 to 2013. *Tables 3.2.1* through *3.2.4* show employment data by Industry Group within each Land Use Category in San Francisco from 2004 to 2013. *Table 3.3* presents San Francisco employment in its geographic context. It shows employment data by Land Use Category in ten Commerce and Industry Districts in San Francisco in 2013. It also shows Private Household employment as its own land use category. This category represents home-based business establishments and organizations, particularly caregivers. These employees were previously classified under the Cultural/Institutional/Educational land use category. In 2012, Treasure Island was added as a new C&I District.

Table 3.1 (next page)

SAN FRANCISCO EMPLOYMENT BY LAND USE CATEGORY, 2005–2014

This table contains the number of jobs in each of the five major non-residential land use categories in San Francisco. Employment for an additional land use category, Private Households (Pvt HH), was added in 2009. These jobs were previously counted under CIE. Data is presented from 2009–2013 (see Section 1.2 - Data Formats for a description of land use categories and the NAICS economic sectors). Also included is the percentage distribution in any given year and the annual change within each land use category. The data include graphs below in Figures 3.1.1 (a snapshot of job distribution in 2013) and 3.1.1 (a look at ten-year trends).

Notes:

- Due to rounding, figures may not add to the total shown.
- PDR = Production/Distribution/Repair
- CIE = Cultural, Institutional, or Educational
- Pvt HH = Private Household employment
- *Prior to 2008, Households were counted as part of CIE.
- The 12% decline in CIE employment between 2008–2009 can be attributed to the treatment of Private Households as a separate land use category in 2009.
- From 2003–2005, annual average includes last quarter of previous year, and first three quarters of current year.

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

Annual Average Number of Jobs

Land Use Category	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Office	195,521	206,271	214,661	221,250	211,885	211,050	218,837	231,908	244,262	260,976
Retail	96,033	98,294	102,253	103,443	98,278	98,139	100,598	106,305	111,754	117,654
PDR	84,693	81,699	84,986	84,710	76,727	72,967	72,466	75,637	78,234	81,519
Hotel	18,424	19,087	19,070	19,527	17,828	17,568	17,795	17,400	18,136	16,646
CIE	128,726	130,645	135,361	141,848	124,831	126,208	129,015	132,851	156,157	157,988
Pvt HH	-	-	-	-	19,443	19,819	20,327	22,156	4,113	5,597
TOTAL	523,397	535,996	556,330	570,778	548,992	545,751	559,038	586,257	612,656	640,380

Annual Percentage Distribution

Land Use Category	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Office	37.4	38.5	38.6	38.8	38.6	38.7	39.1	39.6	39.9	40.8
Retail	18.3	18.3	18.4	18.1	17.9	18.0	18.0	18.1	18.2	18.4
PDR	16.2	15.2	15.3	14.8	14.0	13.4	13.0	12.9	12.8	12.7
Hotel	3.5	3.6	3.4	3.4	3.2	3.2	3.2	3.0	3.0	2.6
CIE	24.6	24.4	24.3	24.9	22.7	23.1	23.1	22.7	25.5	24.7
Pvt HH	-	-	-	-	3.5	3.6	3.6	3.8	0.7	0.9
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
Office	5.5	4.1	3.1	-4.2	-0.4	3.7	6.0	5.3	6.8
Retail	2.4	4.0	1.2	-5.0	-0.1	2.5	5.7	5.1	5.3
PDR	-3.5	4.0	-0.3	-9.4	-4.9	-0.7	4.4	3.4	4.2
Hotel	3.6	-0.1	2.4	-8.7	-1.5	1.3	-2.2	4.2	-8.2
CIE	1.5	3.6	4.8	-12.0	1.1	2.2	3.0	17.5	1.2
Pvt HH	-	-	-	-	1.9	2.6	9.0	-81.4	36.1
TOTAL	2.4	3.8	2.6	-7.2	3.1	2.4	4.9	4.5	4.5

Note:

• Starting in 2013, the Bureau of Labor Statistics reclassified In-Home Supportive Services (roughly 20,000 jobs) from the Private Household category to CIE.

Figure 3.1.1

SAN FRANCISCO EMPLOYMENT BY LAND USE CATEGORY, 2013



Figure 3.1.2

SAN FRANCISCO EMPLOYMENT BY LAND USE CATEGORY, 2005-2014

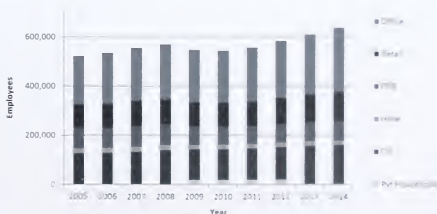


Table 3.2.1

OFFICE EMPLOYMENT BY INDUSTRY GROUP, 2005-2014

This table presents job trends in the office land use category. Also included is the percentage distribution in any given year and the annual change within the office land use category. Figure 3.2.1 presents the job trends graphically.

Annual Average Number of Jobs

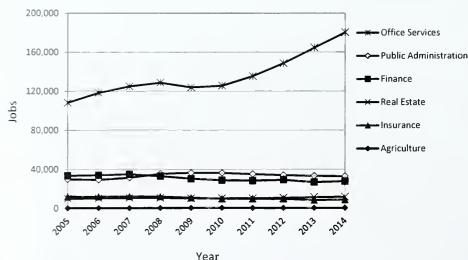
Industry Group	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Agriculture	228	241	220	251	330	357	272	184	159	172
Finance	33,554	34,239	34,975	33,033	30,313	28,742	28,316	29,048	26,736	27,621
Insurance	12,174	11,962	12,249	12,003	10,799	9,796	9,729	9,512	8,306	8,734
Real Estate	10,033	10,316	10,704	10,739	10,146	10,206	10,126	10,554	11,292	11,507
Office Services	108,312	118,328	124,973	128,754	123,917	125,641	135,363	148,682	164,602	180,174
Public Administration	29,834	29,339	31,490	35,458	36,380	36,308	35,032	33,928	33,166	32,768
TOTAL	194,136	204,425	214,611	220,237	211,885	211,050	218,838	231,908	244,261	260,976

Annual Percentage Distribution

Industry Group	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Agriculture	0.1	0.1	0.1	0.1	0.2	0.2	0.1	0.1	0.1	0.1
Finance	17.3	16.7	16.3	15.0	14.3	13.6	12.9	12.5	10.9	10.6
Insurance	6.3	5.9	5.7	5.5	5.1	4.6	4.4	4.1	3.4	3.3
Real Estate	5.2	5.0	5.0	4.9	4.8	4.8	4.6	4.6	4.6	4.4
Office Services	55.8	57.9	58.2	58.5	58.5	59.5	61.9	64.1	67.4	69.0
Public Administration	15.4	14.4	14.7	16.1	17.2	17.2	16.0	14.6	13.6	12.6
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
Agriculture	5.8	-8.5	13.7	31.7	8.2	-23.8	-32.4	-13.6	8.2
Finance	2.0	2.1	-5.6	-8.2	-5.2	-1.5	2.6	-8.0	3.3
Insurance	-1.7	2.4	-2.0	-10.0	-9.3	-0.7	-2.2	-12.7	5.2
Real Estate	2.8	3.8	0.3	-5.5	0.6	-0.8	4.2	7.0	1.9
Office Services	9.2	5.6	3.0	-3.8	1.4	7.7	9.8	10.7	9.5
Public Administration	-1.7	7.3	12.6	2.6	-0.2	-3.5	-3.2	-2.2	-1.2
TOTAL	5.3	5.0	2.6	-3.8	-0.4	3.7	6.0	5.3	6.8



Notes:

- Due to rounding, figures may not add to the total shown.
- For years before 2009, sum are less than in Table 3.1 due to increased data suppression warranted by the smaller industrial scale of analysis.
- Agriculture refers to those working in offices whose line of work is related to agriculture.
- Office Services consists of the following:
 - Management of companies and enterprises
 - Professional, scientific, and technical Services
 - Administrative and support
 - Internet publishing & broadcasting
 - Internet, web search, & data processing services
 - Other information services

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

Table & Figure 3.2.2

RETAIL EMPLOYMENT BY INDUSTRY GROUP, 2005–2014

This table presents job trends in the retail land use category. Also included is the percentage distribution in any given year and the annual change within the retail land use category. Figure 3.2.2 presents the job trends graphically.

Annual Average Number of Jobs

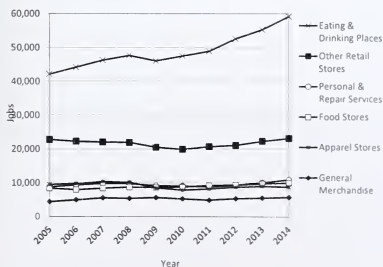
Industry Group	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
General Merchandise	4,401	4,921	5,486	5,337	5,598	5,219	4,846	5,302	5,457	5,606
Food Stores	8,394	7,940	8,382	8,694	8,575	8,727	9,213	9,349	9,695	9,959
Apparel Stores	9,509	9,698	10,313	10,117	8,434	7,815	8,184	8,687	8,957	8,743
Eating & Drinking Places	42,139	44,183	46,260	47,662	46,049	47,483	48,893	52,600	55,312	59,203
Other Retail Stores	22,794	22,247	22,033	21,926	20,486	19,886	20,678	21,070	22,291	23,147
Personal & Repair Services	8,795	9,306	9,780	9,707	9,136	9,009	8,784	9,298	10,041	10,906
TOTAL	96,033	98,294	102,253	103,443	98,278	98,139	100,598	106,306	111,753	117,654

Annual Percentage Distribution

Industry Group	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
General Merchandise	4.6	5.0	5.4	5.2	5.7	5.3	4.8	5.0	4.9	4.8
Food Stores	8.7	8.1	8.2	8.4	8.7	8.9	9.2	8.8	8.7	8.5
Apparel Stores	9.9	9.9	10.1	9.8	8.6	8.0	8.1	8.2	8.0	7.4
Eating & Drinking Places	43.9	44.9	45.2	46.1	46.9	48.4	48.6	49.5	49.5	50.3
Other Retail Stores	23.7	22.6	21.5	21.2	20.8	20.3	20.6	19.8	19.9	19.7
Personal & Repair Services	9.2	9.5	9.6	9.4	9.3	9.2	8.7	8.7	9.0	9.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
General Merchandise	11.8	11.5	-2.7	4.9	-6.8	-7.1	9.4	2.9	4.4
Food Stores	-5.4	5.6	3.7	-1.4	1.8	5.6	1.5	3.7	2.7
Apparel Stores	2.0	6.3	-1.9	-16.6	-7.3	4.7	6.1	3.1	-2.4
Eating & Drinking Places	4.9	4.7	3.0	-3.4	3.1	3.0	7.6	5.2	7.0
Other Retail Stores	-2.4	-1.0	-0.5	-6.6	-2.9	4.0	1.9	5.8	3.8
Personal & Repair Services	5.8	5.1	-0.7	-5.9	-1.4	-2.5	5.9	8.0	8.6
TOTAL	2.4	4.0	1.2	-5.0	-0.1	2.5	5.7	5.1	5.3

**Notes:**

- Due to rounding, figures may not add to the total shown
- Other Retail Stores include:
 - Motor vehicle parts and dealers
 - Electronics and appliance stores
 - Furniture and home furnishings stores
 - Miscellaneous retail stores
 - Rental and leasing services
 - Building material and garden equipment supply dealers
 - Health and personal care stores
 - Gasoline stations
 - Sporting goods, hobby, book, and music stores
 - Non-store retailers

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

Table 3.2.3

PRODUCTION, DISTRIBUTION/REPAIR (PDR) EMPLOYMENT BY INDUSTRY GROUP, 2005-2014

This table presents job trends in the PDR land use category. Also included is the percentage distribution in any given year and the annual change within the PDR land use category. Figure 3.2.3 presents the job trends graphically.

Annual Average Number of Jobs

Industry Group	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Construction	16,615	17,397	19,415	19,630	15,813	14,474	13,860	15,011	15,759	17,000
Transportation	20,222	19,204	19,071	17,484	17,044	16,305	16,052	16,135	16,431	16,837
Utilities	10,503	9,541	7,061	7,837	7,936	7,874	8,364	8,479	8,466	8,614
Information	6,930	6,189	8,350	8,359	7,165	6,565	6,531	6,724	7,176	7,221
Wholesale	12,087	11,729	12,274	12,377	10,943	10,499	10,830	12,015	13,317	13,908
Food Manufacturing	2,572	2,052	1,974	2,008	1,920	1,865	1,867	2,063	2,199	2,286
Apparel Manufacturing	3,387	3,172	2,864	2,426	1,847	1,487	1,513	1,536	1,512	1,559
Printing & Publishing	7,494	7,419	7,738	7,379	8,096	7,687	7,114	7,351	6,849	6,722
Other Manufacturing	4,815	4,921	6,050	5,626	5,963	6,211	6,335	6,323	6,525	7,372
TOTAL	84,623	81,625	84,796	83,125	76,727	72,967	72,466	75,637	78,234	81,519

Annual Percentage Distribution

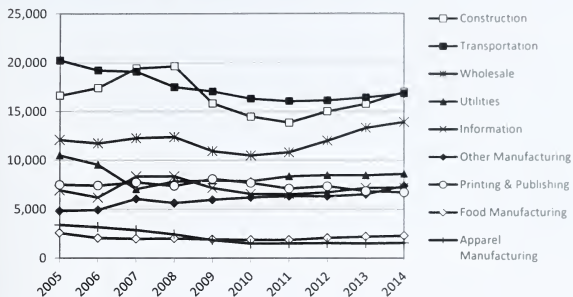
Industry Group	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Construction	19.6	21.3	22.9	23.6	20.6	19.8	19.1	19.8	20.1	20.9
Transportation	23.9	23.5	22.5	21.0	22.2	22.3	22.2	21.3	21.0	20.7
Utilities	12.4	11.7	8.3	9.4	10.3	10.8	11.5	11.2	10.8	10.6
Information	8.2	7.6	9.8	10.1	9.3	9.0	9.0	8.9	9.2	8.9
Wholesale	14.3	14.4	14.5	14.9	14.3	14.4	14.9	15.9	17.0	17.1
Food Manufacturing	3.0	2.5	2.3	2.4	2.5	2.6	2.6	2.7	2.8	2.8
Apparel Manufacturing	4.0	3.9	3.4	2.9	2.4	2.0	2.1	2.0	1.9	1.9
Printing & Publishing	8.9	9.1	9.1	8.9	10.6	10.5	9.8	9.7	8.8	8.2
Other Manufacturing	5.7	6.0	7.1	6.8	7.8	8.5	8.7	8.4	8.3	9.0
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
Construction	4.7	11.6	1.1	-19.4	-8.5	-4.2	8.3	5.0	7.9
Transportation	-5.0	-0.7	-8.3	-2.5	-4.3	-1.6	0.5	1.8	2.5
Utilities	-9.2	-26.0	11.0	1.3	-0.8	6.2	1.4	-0.2	1.7
Information	-10.7	34.9	0.1	-14.3	-8.4	-0.5	3.0	6.7	0.6
Wholesale	-3.0	4.6	0.8	-11.6	-4.1	3.2	10.9	10.8	4.4
Food Manufacturing	-20.2	-3.8	1.7	-4.4	-2.9	0.1	10.5	6.6	4.0
Apparel Manufacturing	-6.4	-9.7	-15.3	-23.9	-19.5	1.7	1.5	-1.6	3.1
Printing & Publishing	-1.0	4.3	-4.6	9.7	-5.1	-7.5	3.3	-6.8	-1.9
Other Manufacturing	2.2	22.9	-7.0	6.0	4.2	2.0	-0.2	3.2	13.0
TOTAL	-3.5	3.9	-2.0	-7.7	-4.9	-0.7	4.4	3.4	4.2

Figure 3.2.3

PRODUCTION/DISTRIBUTION/REPAIR (PDR) EMPLOYMENT BY INDUSTRY GROUP, 2005–2014



Notes:

- PDR = Production/Distribution/Repair
- Due to rounding, figures may not add to the total shown.
- Sum is less than in Table 3.1 due to increased data suppression warranted by the smaller industrial scale of analysis.
- Information Establishments include:
 - Broadcasting except internet
 - Telecommunications
- Other Manufacturing includes:
 - Lumber, furniture & fixtures, paper products
 - Chemicals and petroleum production
 - Rubber, leather, stone/clay/glass/concrete
 - Metal, industrial machinery & equipment
 - Electric and electronic manufacturing
 - Transportation equipment
 - Instruments, miscellaneous
 - Motion picture production & sound recording

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

Table 5: Figure 3.2.4

CULTURAL/INSTITUTIONAL/EDUCATIONAL (CIE) EMPLOYMENT BY INDUSTRY GROUP, 2005-2014

This table presents job trends in the cultural/institutional/educational (CIE) land use category. Also included is the percentage distribution in any given year and the annual change within the CIE land use category. Figure 3.2.4 presents the job trends graphically.

Annual Average Number of Jobs

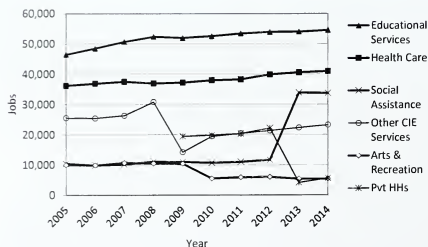
Industry Group	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Art & Recreation	10,006	9,875	10,645	10,477	10,420	5,491	5,863	5,995	5,388	5,430
Health Care	36,222	36,910	37,530	36,995	37,211	37,999	38,279	39,896	40,575	40,988
Educational Services	46,507	48,539	50,732	52,424	52,022	52,595	53,470	53,996	54,048	54,602
Social Assistance	10,439	9,876	10,138	11,117	10,977	10,690	11,000	11,642	33,860	33,734
Other CIE Services	25,553	25,446	26,316	30,835	14,201	19,433	20,403	21,324	22,286	23,233
Pvt HH	-	-	-	-	19,443	19,819	20,327	22,156	4,113	5,597
TOTAL	128,726	130,645	135,361	141,848	144,274	146,027	149,342	155,009	160,270	163,584

Annual Percentage Distribution

Industry Group	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Art & Recreation	7.8	7.6	7.9	7.4	7.2	3.8	3.9	3.9	3.4	3.3
Health Care	28.1	28.3	27.7	26.1	25.8	26.0	25.6	25.7	25.3	25.1
Educational Services	36.1	37.2	37.5	37.0	36.1	36.0	35.8	34.8	33.7	33.4
Social Assistance	8.1	7.6	7.5	7.8	7.6	7.3	7.4	7.5	21.1	20.6
Other CIE Services	19.9	19.5	19.4	21.7	9.8	13.3	13.7	13.8	13.9	14.2
Pvt HH	-	-	-	-	13.5	13.6	13.6	14.3	2.6	3.4
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
Art & Recreation	-1.3	7.8	-1.6	-0.5	-47.3	6.8	2.3	-10.1	0.8
Health Care	1.9	1.7	-1.4	0.6	2.1	0.7	4.2	1.7	1.0
Educational Services	4.4	4.5	3.3	-0.8	1.1	1.7	1.0	0.1	1.0
Social Assistance	-5.4	2.6	9.7	-1.3	-2.6	2.9	5.8	190.8	-0.4
Other CIE Services	-0.4	3.4	17.2	-53.9	36.8	5.0	4.5	4.5	4.2
Pvt HH	-	-	-	-	1.9	2.6	9.0	-81.4	36.1
TOTAL	1.5	3.6	4.8	1.7	1.2	2.3	3.8	3.4	2.1

**Notes:**

- Other CIE Services include:
 - Museums, historical sites, zoos, and parks
 - Membership associations and organizations
 - Private household employment (prior to 2009)
- *Pvt HH = Private Household employment
- Prior to 2009, private households were counted as part of Other CIE Services and constituted the majority of Other CIE Services.
- The 54% decline in "Other CIE Services" employment between 2008-2009 can be attributed to the treatment of Private Households as a separate land use category in 2009.
- Starting in 2013, the Bureau of Labor Statistics reclassified In-Home Supportive Services (roughly 20,000 jobs) from the Private Household category to CIE. This explains the 190% jump in Social Assistance jobs from 2012-2013.
- Due to rounding, figures may not add to the total shown.

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

Table 3.3

**EMPLOYMENT BY
COMMERCE & INDUSTRY
DISTRICT AND LAND USE
CATEGORY, 2014**

This table presents the geographic distribution of jobs within San Francisco's eleven Commerce & Industry Districts, by land use category (see Section 1.2 – Data Formats for more on these districts). The Treasure Island District was added this year.

Employment by Land Use Category and C&I District

C&I District	Office	Retail	PDR	Hotel	CIE	Pvt HH	Total
Bayview	2,311	2,759	12,287	11	2,978	94	20,440
Civic Center	15,080	9,466	1,659	4,915	10,664	154	41,938
Financial	138,247	20,143	21,544	5,093	15,446	758	201,231
Mission	4,340	7,664	2,889	24	6,000	292	21,209
North Beach	3,576	8,449	1,477	1,274	5,126	209	20,111
North Central	5,376	12,161	1,418	588	43,837	840	64,220
Northwest	4,234	6,478	2,546	40	14,131	553	27,982
South of Market	63,995	24,653	29,973	3,562	23,651	579	146,413
Southwest	7,483	14,995	4,476	112	26,170	1,028	54,264
Van Ness	4,153	7,281	731	935	7,573	283	20,956
Treasure Island	32	14	78	0	823	3	950
Unclassified	12,149	3,591	2,441	92	1,589	804	20,666
TOTAL	260,976	117,654	81,519	16,646	157,988	5,597	640,380

Percentage Distribution by Commerce and Industry District

C&I District	Office	Retail	PDR	Hotel	CIE	Pvt HH	Total
Bayview	0.9	2.3	15.1	0.1	1.9	1.7	3.2
Civic Center	5.8	8.0	2.0	29.5	6.7	2.8	6.5
Financial	53.0	17.1	26.4	30.6	9.8	13.5	31.4
Mission	1.7	6.5	3.5	0.1	3.8	5.2	3.3
North Beach	1.4	7.2	1.8	7.7	3.2	3.7	3.1
North Central	2.1	10.3	1.7	3.5	27.7	15.0	10.0
Northwest	1.6	5.5	3.1	0.2	8.9	9.9	4.4
South of Market	24.5	21.0	36.8	21.4	15.0	10.3	22.9
Southwest	2.9	12.7	5.5	0.7	16.6	18.4	8.5
Van Ness	1.6	6.2	0.9	5.6	4.8	5.1	3.3
Treasure Island	0.0	0.0	0.1	0.0	0.5	0.1	0.1
Unclassified	4.7	3.1	3.0	0.6	1.0	14.4	3.2
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Land Use Category

C&I District	Office	Retail	PDR	Hotel	CIE	Pvt HH	Total
Bayview	11.3	13.5	60.1	0.1	14.6	0.5	100.0
Civic Center	36.0	22.6	4.0	11.7	25.4	0.4	100.0
Financial	68.7	10.0	10.7	2.5	7.7	0.4	100.0
Mission	20.5	36.1	13.6	0.1	28.3	1.4	100.0
North Beach	17.8	42.0	7.3	6.3	25.5	1.0	100.0
North Central	8.4	18.9	2.2	0.9	68.3	1.3	100.0
Northwest	15.1	23.2	9.1	0.1	50.5	2.0	100.0
South of Market	43.7	16.8	20.5	2.4	16.2	0.4	100.0
Southwest	13.8	27.6	8.2	0.2	48.2	1.9	100.0
Van Ness	19.8	34.7	3.5	4.5	36.1	1.4	100.0
Treasure Island	3.4	1.5	8.2	0.0	86.6	0.3	100.0
Unclassified	58.8	17.4	11.8	0.4	7.7	3.9	100.0
TOTAL	40.8	18.4	12.7	2.6	24.7	0.9	100.0

Notes:

- PDR = Production/Distribution/Repair
- CIE = Cultural/Institutional/Educational
- Pvt HH = Private Household employment
- Prior to 2008, Households (NAICS 814) were counted under the CIE land use category. In 2009, they were counted as Other.
- See Map 1.1 for San Francisco C & I district boundaries

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department



Photo by Phil Parker, "lunch time downtown San Francisco" June 12, 2015 via Flickr, Creative Commons Attribution

4.0 Establishments

This chapter provides information about the number and distribution of establishments in San Francisco. This data is gathered from the California Employment Development Department (EDD).

This chapter reports establishment data by the locations of business, production, or operations. A single company or owner may conduct operations or services at multiple locations; each location is included. The data does not include San Francisco businesses that are exempt from paying local business tax. Government agencies and various non-profit organizations are exempt from local business tax. Businesses that fail to file taxes are also not included.

Establishment data is reported both for the entire city and the city's ten Commerce and Industry Districts by five Land Use categories - Office, Retail, Production/Distribution/Repair (PDR), Hotel, and Cultural/Institutional/Educational (CIE). Beginning in 2009, establishment data are also reported for Private Households (Pvt HH). This category includes home-based business establishments and organizations, such as cooks, maids, butlers, private caregivers and outside workers, such as gardeners, caretakers, and other maintenance workers. These household establishments were previously counted under the CIE land use category. For an explanation of Land Use Category and Commerce and Industry District, refer to Section 1.2 - Data Formats. In addition, some data are reported for a new Commerce and Industry District, Treasure Island.

Table 4.1 shows establishment data by Land Use Category from 2004 to 2013. Tables 4.2.1 through 4.2.4 show establishment data by Industry Group within each Land Use Category in San Francisco from 2004 to 2013. Tables 4.5 and 4.4 present San Francisco establishments for 2013 in geographic context. Table 4.3 shows the distribution of establishments throughout the city by Land

Use Category type. Table 4.4 shows the distribution of establishments throughout the city by employer size.

The tables show a number of establishments for whom the geographical location is not known or which are at the San Francisco International Airport. These have been placed under an Unclassified category. Other establishments that have not registered a physical address with the State and thus cannot be classified under a specific geographic district are also included in this category.

Table 4.1

SAN FRANCISCO ESTABLISHMENTS BY LAND USE CATEGORY, 2005–2014

This table contains the number of establishments in each of the five major non-residential land use categories in San Francisco. Data is presented from 2005–2014. Also included is the percentage distribution in any given year and the annual change within each land use category. The data is also presented graphically below in Figures 4.1.1 (a snapshot of establishment distribution in 2011) and 4.1.2 (a look at ten year trends).

Number of Establishments

Land Use Category	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Office	10,778	11,280	11,179	11,292	11,419	11,430	11,511	11,938	12,542	13,366
Retail	7,450	7,517	7,395	7,473	7,496	7,541	7,516	7,666	7,947	8,189
PDR	4,826	4,847	4,839	4,812	4,718	4,614	4,483	4,500	4,596	4,700
Hotel	320	311	291	288	292	299	290	297	305	311
CIE	19,254	19,481	20,235	20,710	4,739	4,794	4,844	4,930	25,597	26,246
Pvt HH	-	-	-	-	22,864	24,161	26,607	26,140	4,184	4,240
TOTAL	42,628	43,436	43,939	44,575	51,528	52,839	55,251	55,471	55,171	57,052

Annual Percentage Distribution

Land Use Category	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Office	25.3	26.0	25.4	25.3	22.2	21.6	20.8	21.5	22.7	23.4
Retail	17.5	17.3	16.8	16.8	14.5	14.3	13.6	13.8	14.4	14.4
PDR	11.3	11.2	11.0	10.8	9.2	8.7	8.1	8.1	8.3	8.2
Hotel	0.8	0.7	0.7	0.6	0.6	0.6	0.5	0.5	0.6	0.5
CIE	45.2	44.8	46.1	46.5	9.2	9.1	8.8	8.9	46.4	46.0
Pvt HH	-	-	-	-	55.6	54.3	48.2	47.1	7.6	7.4
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
Office	4.7	-0.9	1.0	1.1	0.1	0.7	3.7	5.1	6.6
Retail	0.9	-1.6	1.1	0.3	0.6	-0.3	2.0	3.7	3.0
PDR	0.4	-0.2	-0.6	-2.0	-2.2	-2.8	0.4	2.1	2.3
Hotel	-2.8	-6.4	-1.0	1.4	2.4	-3.0	2.4	2.7	2.0
CIE	1.2	3.9	2.3	-77.1	1.2	1.0	1.8	419.2	2.5
Pvt HH	-	-	-	-	5.7	10.1	-1.8	-84.0	1.3
TOTAL	1.9	1.2	1.4	15.6	2.5	4.6	0.4	-0.5	3.4

Notes:

- PDR = Production/Distribution/Repair
- CIE = Cultural/Institutional/Educational
- Pvt HH = Private Household employment
- *The 81% decline in CIE establishments between 2008-2009 can be attributed to the treatment of Private Households as a separate land use category in 2009.
- Prior to 2009, private households were counted as part of CIE.
- Starting in 2013, the Bureau of Labor Statistics reclassified In-Home Supportive Services (roughly 20,000 jobs) from the Private Household category to CIE.

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

Figure 4.1.1a

SAN FRANCISCO ESTABLISHMENTS BY LAND USE CATEGORY, 2014

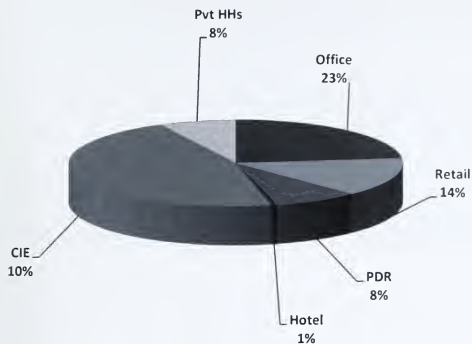


Figure 4.1.1b

SAN FRANCISCO ESTABLISHMENTS BY LAND USE CATEGORY, 2005–2014

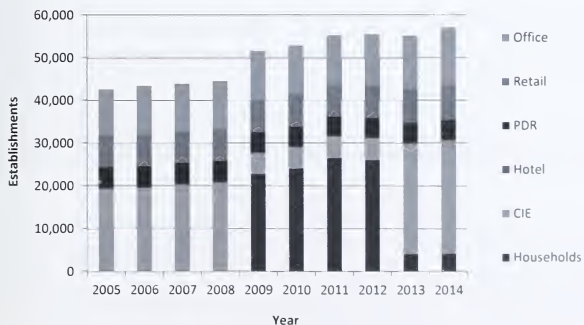


Table & Figure 4.2.1

OFFICE ESTABLISHMENTS BY INDUSTRY GROUP, 2005-2014

This table presents establishment trends in the office land use category. Also included is the percentage distribution in any given year and the annual change within the office land use category. Figure 4.2.1 presents the establishment trends graphically.

Number of Establishments

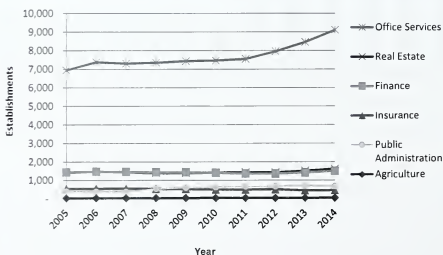
Industry Group	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Agriculture	38	37	36	34	39	43	41	38	40	44
Finance	1,438	1,464	1,455	1,436	1,434	1,399	1,357	1,353	1,410	1,493
Insurance	547	552	559	537	525	498	492	508	445	454
Real Estate	1,418	1,472	1,443	1,393	1,391	1,412	1,424	1,417	1,506	1,604
Office Services	6,937	7,371	7,297	7,343	7,429	7,456	7,544	7,951	8,454	9,104
Public Administration	401	380	384	540	601	622	653	671	688	668
TOTAL	10,778	11,275	11,173	11,283	11,419	11,430	11,511	11,938	12,543	13,367

Annual Percentage Distribution

Industry Group	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Agriculture	0.4	0.3	0.3	0.3	0.3	0.4	0.4	0.3	0.3	0.3
Finance	13.3	13.0	13.0	12.7	12.6	12.2	11.8	11.3	11.2	11.2
Insurance	5.1	4.9	5.0	4.8	4.6	4.4	4.3	4.3	3.5	3.4
Real Estate	13.2	13.1	12.9	12.3	12.2	12.4	12.4	11.9	12.0	12.0
Office Services	64.4	65.4	65.3	65.1	65.1	65.2	65.5	66.6	67.4	68.1
Public Administration	3.7	3.4	3.4	4.8	5.3	5.4	5.7	5.6	5.5	5.0
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
Agriculture	-2.6	-1.4	-6.2	14.7	5.1	-4.7	-7.3	5.3	10.0
Finance	1.8	-0.6	-1.3	-0.1	-5.4	-3.0	-0.3	4.2	5.9
Insurance	0.9	1.2	-3.8	-2.3	-6.3	-1.2	3.3	-12.4	2.0
Real Estate	3.8	-2.0	-3.4	-0.1	2.4	0.8	-0.5	6.3	6.5
Office Services	6.3	-1.0	0.6	1.2	1.5	1.2	5.4	6.3	7.7
Public Administration	-5.2	1.2	40.5	11.4	8.7	5.0	2.8	2.5	-2.9
TOTAL	4.6	-0.9	1.0	1.2	0.8	0.7	3.7	5.1	6.6

**Notes:**

- Due to rounding, figures may not add to the total shown.
- Office Service consists of the following:
 - Management of companies and enterprises
 - Professional, scientific, and technical services
 - Administrative and support
 - Internet publishing & broadcasting
 - Internet, web search, & data processing services
 - Other information services
- Prior to 2009, sums are less than in Table 4.1 due to increased data suppression warranted by the smaller industrial scale of analysis.

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

Table & Figure 4.2.2

RETAIL ESTABLISHMENTS BY INDUSTRY GROUP, 2005–2014

This table presents establishment trends in the retail land use category. Also included is the percentage distribution in any given year and the annual change within the retail land use category. Figure 4.2.2 presents the establishment trends graphically.

Number of Establishments

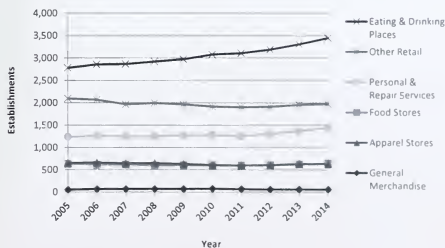
Industry Group	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
General Merchandise	55	69	68	71	72	76	67	62	63	63
Food Stores	629	608	612	594	598	597	597	605	624	644
Apparel Stores	654	661	647	650	630	604	598	605	635	630
Eating & Drinking Places	2,780	2,858	2,867	2,921	2,972	3,078	3,108	3,189	3,307	3,448
Other Retail	2,097	2,068	1,965	1,995	1,962	1,914	1,900	1,910	1,955	1,971
Personal & Repair Services	1,235	1,255	1,237	1,242	1,262	1,272	1,246	1,296	1,363	1,433
TOTAL	7,450	7,517	7,395	7,473	7,496	7,541	7,516	7,667	7,947	8,189

Annual Percentage Distribution

Industry Group	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
General Merchandise	0.7	0.9	0.9	1.0	1.0	1.0	0.9	0.8	0.8	0.8
Food Stores	8.4	8.1	8.3	7.9	8.0	7.9	7.9	7.9	7.9	7.9
Apparel Stores	8.8	8.8	8.7	8.7	8.4	8.0	8.0	7.9	8.0	7.7
Eating & Drinking Places	37.3	38.0	38.8	39.1	39.6	40.8	41.4	41.6	41.6	42.1
Other Retail	28.2	27.5	26.6	26.7	26.2	25.4	25.3	24.9	24.6	24.1
Personal & Repair Services	16.6	16.7	16.7	16.6	16.8	16.9	16.6	16.9	17.2	17.5
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
General Merchandise	25.1	-1.1	4.8	1.4	-6.9	-11.8	-7.5	1.6	0.0
Food Stores	-3.4	0.6	-2.9	0.8	-0.2	0.0	1.3	3.1	3.2
Apparel Stores	1.0	-2.2	0.5	-3.1	-5.1	-1.0	1.2	5.0	-0.8
Eating & Drinking Places	2.8	0.3	1.9	1.8	4.6	1.0	2.6	3.7	4.3
Other Retail	-1.4	-4.9	1.5	-1.7	-3.2	-0.7	0.5	2.4	0.8
Personal & Repair Services	1.6	-1.4	0.4	1.6	-1.3	-2.0	4.0	5.2	5.1
TOTAL	0.9	-1.6	1.1	0.3	0.3	-0.3	2.0	3.7	3.0

**Notes:**

- Due to rounding, figures may not add to the total shown
- Other Retail Stores include:
 - Motor vehicle parts and dealers
 - Electronics and appliance stores
 - Furniture and home furnishings stores
 - Miscellaneous retail stores
 - Rental and leasing services
 - Building material and garden equipment supply dealers
 - Health and personal care stores
 - Gasoline stations
 - Sporting goods, hobby, book, and music stores
 - Non-store retailers

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

Table 4.2.3

PDR ESTABLISHMENTS BY INDUSTRY GROUP, 2005-2014

This table presents establishment trends in the PDR land use category. Also included is the percentage distribution in any given year and the annual change within the PDR land use category. Figure 4.2.3 presents the establishment trends graphically.

Number of Establishments

Industry Group	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Construction	1,647	1,708	1,687	1,676	1,641	1,598	1,538	1,515	1,551	1,610
Transportation	527	502	494	503	418	417	398	400	408	429
Utilities	26	25	26	25	22	25	31	36	36	44
Information	185	187	249	249	247	240	230	229	228	218
Wholesale	1,255	1,293	1,295	1,302	1,253	1,210	1,178	1,196	1,268	1,257
Food Manufacturing	155	152	147	143	140	144	146	157	161	170
Apparel Manufacturing	206	179	168	163	155	146	141	133	128	119
Printing & Publishing	376	358	358	343	342	328	324	338	318	343
Other Manufacturing	450	446	416	410	500	506	499	495	498	511
TOTAL	4,826	4,849	4,839	4,812	4,718	4,614	4,485	4,499	4,596	4,701

Annual Percentage Distribution

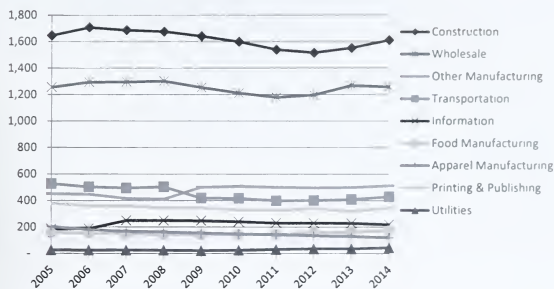
Industry Group	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Construction	34.1	35.2	34.9	34.8	34.8	34.6	34.3	33.7	33.7	34.2
Transportation	10.9	10.3	10.2	10.4	8.9	9.0	8.9	8.9	8.9	9.1
Utilities	0.5	0.5	0.5	0.5	0.5	0.5	0.7	0.8	0.8	0.9
Information	3.8	3.9	5.1	5.2	5.2	5.2	5.1	5.1	5.0	4.6
Wholesale	26.0	26.7	26.8	27.1	26.6	26.2	26.3	26.6	27.6	26.7
Food Manufacturing	3.2	3.1	3.0	3.0	3.0	3.1	3.3	3.5	3.5	3.6
Apparel Manufacturing	4.3	3.7	3.5	3.4	3.3	3.2	3.1	3.0	2.8	2.5
Printing & Publishing	7.8	7.4	7.4	7.1	7.2	7.1	7.2	7.5	6.9	7.3
Other Manufacturing	9.3	9.2	8.6	8.5	10.6	11.0	11.1	11.0	10.8	10.9
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
Construction	3.7	-1.2	-0.6	-2.1	-6.3	-3.8	-1.5	2.4	3.8
Transportation	-4.8	-1.5	1.7	-16.8	-4.8	-4.6	0.5	2.0	5.1
Utilities	-4.8	3.0	-2.9	-12.0	40.9	24.0	16.1	0.0	22.2
Information	1.1	33.2	-0.2	-0.6	-6.9	-4.2	-0.4	-0.4	-4.4
Wholesale	3.1	0.2	0.5	-3.7	-6.0	-2.6	1.5	6.0	-0.9
Food Manufacturing	-2.1	-3.1	-3.2	-1.8	4.3	1.4	7.5	2.5	5.6
Apparel Manufacturing	-12.9	-6.3	-3.1	-4.6	-9.0	-3.4	-5.7	-3.8	-7.0
Printing & Publishing	-4.7	0.1	-4.3	-0.3	-5.3	-1.2	4.3	-5.9	7.9
Other Manufacturing	-0.9	-6.8	-1.3	22.0	-0.2	-1.4	-0.8	0.6	2.6
TOTAL	0.5	-0.2	-0.6	-1.9	-4.9	-2.8	0.3	2.2	2.3

Figure 4.2.3

PDR ESTABLISHMENTS BY INDUSTRY GROUP, 2005–2014



Notes:

- PDR = Production/Distribution/Repair
- Due to rounding, figures may not add to the total shown.
- Information Establishments include:
 - Broadcasting except internet
 - Telecommunications
- Other Manufacturing includes:
 - Lumber, furniture & fixtures, paper products
 - Chemicals and petroleum production
 - Rubber, leather, stone/clay/glass/concrete
 - Instruments, miscellaneous
 - Metal, industrial machinery & equipment
 - Electric and electronic manufacturing
 - Transportation equipment
 - Motion picture production & sound recording

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

Table 4.2.4

CULTURAL, INSTITUTIONAL, EDUCATIONAL (CIE) AND PRIVATE HOUSEHOLD (Pvt HH) ESTABLISHMENTS BY INDUSTRY GROUP, 2005-2014

This table presents establishment trends in the cultural/institutional/educational (CIE) and in the private household (Pvt HH) land use categories. Also included is the percentage distribution in any given year and the annual change within the CIE land use category. Figure 4.2.4 presents the establishment trends graphically.

Number of Establishments

Industry Group	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Arts & Recreation	402	424	424	416	416	246	249	253	265	287
Health Care	2,025	2,086	2,075	2,055	2,071	2,111	2,113	2,120	2,152	2,238
Educational Services	699	699	694	697	703	705	714	726	906	934
Social Assistance*	586	574	590	600	623	628	655	677	21,082	21,523
Other CIE Services*	15,706	16,389	16,684	21,122	926	1,104	1,112	1,154	1,192	1,264
Pvt HH*	-	-	-	-	22,864	24,161	26,607	26,140	4,183	4,239
TOTAL	19,418	20,172	20,466	24,888	27,603	28,955	31,450	31,070	29,780	30,485

Annual Percentage Distribution

Industry Group	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Arts & Recreation	2.1	2.1	2.1	1.7	1.5	0.8	0.8	0.8	0.9	0.9
Health Care	10.4	10.3	10.1	8.3	7.5	7.3	6.7	6.8	7.2	7.3
Educational Services	3.6	3.5	3.4	2.8	2.5	2.4	2.3	2.3	3.0	3.1
Social Assistance*	3.0	2.8	2.9	2.4	2.3	2.2	2.1	2.2	70.8	70.6
Other CIE Services*	80.9	81.2	81.5	84.9	3.4	3.8	3.5	3.7	4.0	4.1
Pvt HH*	-	-	-	-	82.8	83.4	84.6	84.1	14.0	13.9
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

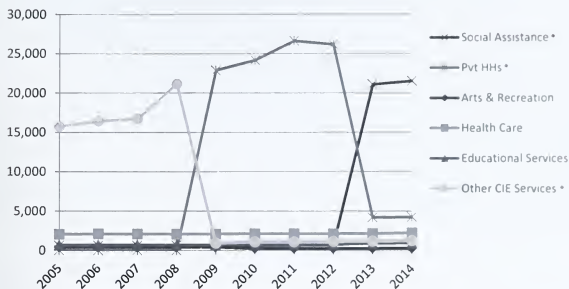
Percentage Change

Industry Group	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
Arts & Recreation	5.5	-0.1	-1.8	0.0	-40.8	1.2	1.6	4.7	8.3
Health Care	3.0	-0.6	-1.0	0.8	1.9	0.1	0.3	1.5	4.0
Educational Services	0.0	-0.7	0.4	0.9	0.3	1.3	1.7	24.8	3.1
Social Assistance*	-2.1	2.8	1.6	3.9	0.8	4.3	3.4	3,014.0	2.1
Other CIE Services*	4.4	1.8	26.6	-95.6	19.2	0.7	3.8	3.3	6.0
Pvt HH*	-	-	-	-	5.7	10.1	-1.8	-84.0	1.3
TOTAL	3.9	1.5	21.6	10.9	4.9	8.6	-1.2	-4.2	2.4

* The grouping of subcategories of data has changed periodically between sectors and this accounts for the data discontinuities.

Figure 4.2.4

CULTURAL/INSTITUTIONAL/EDUCATIONAL ESTABLISHMENTS BY INDUSTRY GROUP, 2005 - 2014



Notes:

- Other CIE Services include:
 - Museums, historical sites, zoos, and parks
 - Membership associations and organizations
 - Private household employment (prior to 2009)
- Pvt HH = Private Household employment
- *The 95.6% decline in Other CIE Services establishments between 2008-2009 can be attributed to the treatment of Private Households as a separate land use category in 2009.
- Starting in 2013, the Bureau of Labor Statistics reclassified In-Home Supportive Services (roughly 20,000 jobs) from the Private Household category to CIE. This explains the large jump in Social Assistance establishments from 2012-2013.

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

* * The grouping of subcategories of data has changed periodically between sectors and this accounts for the data discontinuities.

Table 4.3
ESTABLISHMENTS BY
COMMERCE & INDUSTRY
DISTRICT AND LAND USE
CATEGORY, 2014

This table presents the geographic distribution of establishments within San Francisco's eleven Commerce & Industry Districts by land use category (see Section 1.2 – Data Formats for more on these Districts)

Number of Establishments

C&I District	Office	Retail	PDR	Hotel	CIE	Pot HH	Total
Bayview	170	235	629	4	1,440	82	2,560
Civic Center	936	493	98	64	2,184	113	3,888
Financial	5,153	1,242	726	48	1,980	475	9,624
Mission	519	633	292	7	1,630	240	3,321
North Beach	438	521	139	26	1,734	136	2,994
North Central	960	1,009	240	46	2,686	696	5,637
Northwest	628	594	280	7	2,296	459	4,264
South of Market	2,023	1,235	1,059	40	2,824	339	7,520
Southwest	1,453	1,489	914	22	7,306	1,087	12,271
Van Ness	550	546	104	41	1,830	207	3,278
Treasure Island	6	3	7	0	62	3	81
Unclassified	530	189	212	6	274	403	1,614
TOTAL	13,366	8,189	4,700	311	26,246	4,240	57,052

Percentage Distribution by Commerce and Industry District

C&I District	Office	Retail	PDR	Hotel	CIE	Pot HH	Total
Bayview	1.3	2.9	13.4	1.3	5.5	1.9	4.5
Civic Center	7.0	6.0	2.1	20.6	8.3	2.7	6.8
Financial	38.6	15.2	15.4	15.4	7.5	11.2	16.9
Mission	3.9	7.7	6.2	2.3	6.2	5.7	5.8
North Beach	3.3	6.4	3.0	8.4	6.6	3.2	5.2
North Central	7.2	12.3	5.1	14.8	10.2	16.4	9.9
Northwest	4.7	7.3	6.0	2.3	8.7	10.8	7.5
South of Market	15.1	15.1	22.5	12.9	10.8	8.0	13.2
Southwest	10.9	18.2	19.4	7.1	27.8	25.6	21.5
Van Ness	4.1	6.7	2.2	13.2	7.0	4.9	5.7
Treasure Island	0.0	0.0	0.1	0.0	0.2	0.1	0.1
Unclassified	4.0	2.3	4.5	1.9	1.0	9.5	2.8
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Land Use Category

C&I District	Office	Retail	PDR	Hotel	CIE	Pot HH	Total
Bayview	6.6	9.2	24.6	0.2	56.3	3.2	100.0
Civic Center	24.1	12.7	2.5	1.6	56.2	2.9	100.0
Financial	53.5	12.9	7.5	0.5	20.6	4.9	100.0
Mission	15.6	19.1	8.8	0.2	49.1	7.2	100.0
North Beach	14.6	17.4	4.6	0.9	57.9	4.5	100.0
North Central	17.0	17.9	4.3	0.8	47.6	12.3	100.0
Northwest	14.7	13.9	6.6	0.2	53.8	10.8	100.0
South of Market	26.9	16.4	14.1	0.5	37.6	4.5	100.0
Southwest	11.8	12.1	7.4	0.2	59.5	8.9	100.0
Van Ness	16.8	16.7	3.2	1.3	55.8	6.3	100.0
Treasure Island	7.4	3.7	8.6	0.0	76.5	3.7	100.0
Unclassified	32.8	11.7	13.1	0.4	17.0	25.0	100.0
TOTAL	23.4	14.4	8.2	0.5	46.0	7.4	100.0

Notes:

- Due to rounding, figures may not add to the total shown.
- PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational; Pvt HH = Private Household employment
- Prior to 2009, Private households (NAICS 814) were counted under the CIE land use category.
- Tables 4.2, 4.3, 4.4 provide detailed information of various components of Office, Retail, PDR and CIE respectively.

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

Table 4.4
ESTABLISHMENTS BY
COMMERCE & INDUSTRY
DISTRICT AND SIZE
CLASS, 2014

This table presents the geographic distribution of establishments within San Francisco's eleven Commerce & Industry Districts, by the size of the establishment (see Section 1.2 – Data Formats for more on these Districts).

Number of Employees

C&I District	0-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+	TOTAL
Bayview	1,897	248	202	147	38	23	4	0	1	2,560
Civic Center	2,831	383	300	240	73	38	12	8	3	3,888
Financial	5,303	1,481	1,118	938	407	253	76	33	14	9,623
Mission	2,466	395	248	142	47	18	4	1	0	3,321
North Beach	2,324	262	210	127	43	22	5	1	0	2,994
North Central	4,335	554	398	243	66	29	3	3	6	5,637
Northwest	3,424	391	261	125	31	17	10	3	2	4,264
South of Market	4,797	959	793	556	203	133	44	19	15	7,519
Southwest	10,172	1,009	603	347	92	38	7	2	1	12,271
Van Ness	2,583	297	206	127	34	24	5	2	0	3,278
Treasure Island	67	6	4	2	0	1	1	0	0	81
Unclassified	1,122	209	136	88	29	20	8	2	1	1,615
TOTAL	41,321	6,194	4,479	3,082	1,063	616	179	74	43	57,051

Percentage Distribution by C&I District

C&I District	0-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+	TOTAL
Bayview	4.6	4.0	4.5	4.8	3.6	3.7	2.2	0.0	2.3	4.5
Civic Center	6.9	6.2	6.7	7.8	6.9	6.2	6.7	10.8	7.0	6.8
Financial	12.8	23.9	25.0	30.4	38.3	41.1	42.5	44.6	32.6	16.9
Mission	6.0	6.4	5.5	4.6	4.4	2.9	2.2	1.4	0.0	5.8
North Beach	5.6	4.2	4.7	4.1	4.0	3.6	2.8	1.4	0.0	5.2
North Central	10.5	8.9	8.9	7.9	6.2	4.7	1.7	4.1	14.0	9.9
Northwest	8.3	6.3	5.8	4.1	2.9	2.8	5.6	4.1	4.7	7.5
South of Market	11.6	15.5	17.7	18.0	19.1	21.6	24.6	25.7	34.9	13.2
Southwest	24.6	16.3	13.5	11.3	8.7	6.2	3.9	2.7	2.3	21.5
Van Ness	6.3	4.8	4.6	4.1	3.2	3.9	2.8	2.7	0.0	5.7
Treasure Island	0.2	0.1	0.1	0.1	0.0	0.2	0.6	0.0	0.0	0.1
Unclassified	2.7	3.4	3.0	2.9	2.7	3.2	4.5	2.7	2.3	2.8
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Size Class

C&I District	0-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+	TOTAL
Bayview	74.1	9.7	7.9	5.7	1.5	0.9	0.2	0.0	0.0	100.0
Civic Center	72.8	9.9	7.7	6.2	1.9	1.0	0.3	0.2	0.1	100.0
Financial	55.1	15.4	11.6	9.7	4.2	2.6	0.8	0.3	0.1	100.0
Mission	74.3	11.9	7.5	4.3	1.4	0.5	0.1	0.0	0.0	100.0
North Beach	77.6	8.8	7.0	4.2	1.4	0.7	0.2	0.0	0.0	100.0
North Central	76.9	9.8	7.1	4.3	1.2	0.5	0.1	0.1	0.1	100.0
Northwest	80.3	9.2	6.1	2.9	0.7	0.4	0.2	0.1	0.0	100.0
South of Market	63.8	12.8	10.5	7.4	2.7	1.8	0.6	0.3	0.2	100.0
Southwest	82.9	8.2	4.9	2.8	0.7	0.3	0.1	0.0	0.0	100.0
Van Ness	78.8	9.1	6.3	3.9	1.0	0.7	0.2	0.1	0.0	100.0
Treasure Island	82.7	7.4	4.9	2.5	0.0	1.2	1.2	0.0	0.0	100.0
Unclassified	69.5	12.9	8.4	5.4	1.8	1.2	0.5	0.1	0.1	100.0
TOTAL	72.4	10.9	7.9	5.4	1.9	1.1	0.3	0.1	0.1	100.0

Notes:
• Due to rounding, figures may not add to the total shown.

Sources:
• California Employment Development Department
• Data not publicly available
• Additional calculations by the San Francisco Planning Department



5.0 Monetary Transactions

This chapter presents information about trends in monetary transactions that occur in San Francisco. While the Employment and Establishments chapters provide information regarding the quantity and growth of jobs and establishments in San Francisco, this chapter supplies complementary information regarding the city's economic health in monetary terms. The chapter is divided into three sections, each relating to a key source of revenue in the city's economy such as annual wages, retail sales and permits, and government revenues.

Section 5.1 describes total annual wages received by individuals for work in San Francisco from 2005 to 2014, using data supplied by the California Employment Development Department (EDD). Section 5.2 presents the State Board of Equalization's data on San Francisco's taxable retail sales and sales tax permits in 2014. Section 5.3 reports city government revenues and expenditures in fiscal year 2014 (July 1, 2013 to June 30, 2014). This data is obtained from the City Controller's office. The tables in each section report each indicator's quantity in specific units and annual percentage distribution.

Nominal or current dollars reported for a specified period of time have been adjusted for inflation to obtain constant dollars. The adjustments have been made to control for inflated monetary values, thus enabling better measurement of an indicator's economic performance over time. The adjustments have been made by dividing nominal or current values by the Consumer Price Index (CPI) provided by the United States Department of Labor, Bureau of Labor Statistics.

5.1 WAGES BY LAND USE CATEGORY

This section describes total annual earnings received by persons for work in San Francisco from 2005 to 2014. Persons who received wages include workers who commute into the city and San Francisco residents employed in the city. The California Employment Development Department (EDD) prepares the measure of total annual wages. It includes each employee's total wages as reported by businesses in their payroll records. The earnings of sole proprietors are not reported in these data. Total annual wages are presented in thousands of dollars, annual percentage distribution, and percentage change.

This section complements Chapter 3, Employment. The employment and wages data in this inventory are derived from the same source, and are organized by Land Use Category. For an explanation of the Land Use Categories and C&I Districts, refer to Section 1.2, Data Formats.

5.2 TAXABLE SALES AND PERMITS

Section 5.2 reports taxable sales in retail stores and the number of sales tax permits issued for retail stores located in San Francisco from 2005–2014. Taxable sales and permits in California are reported by the California State Board of Equalization (SBE). Taxable sales revenues and sales tax permits issued for outlets that are not retail stores, including business and personal services, have not been included. Such outlets include the following: non-store retailers (vending machines, sales by telephone), public utilities, government agencies, educational institutions, health services, and advertising agencies.

Taxable sales are measured by transactions subject to sales and use tax, and are reported quarterly by type of business for all cities and counties in California

Businesses are classified by the SBE according to their principal line of merchandise or service. Taxable sales are reported by type of business, but cannot be broken down by commodity. Those data do not include sales that are not subject to sales or use tax, such as food for home consumption, prescription medicine, sales for resale, and taxable sales disclosed by board audits.

The number of sales tax permits represents the number of businesses operated by all manufacturers, wholesalers, and retailers of tangible personal property, except those dealing in non-taxable commodities. Permits are tabulated semi-annually on January 1 and July 1.

5.3 CITY REVENUES AND EXPENDITURES

Section 5.3 presents San Francisco city government revenues and expenditures for fiscal year 2012-2013. The fiscal year ends on June 30th. The data in this subsection is from the Comprehensive Annual Financial Report, prepared by the San Francisco Controller's Office. This data covers the general fund, special revenue funds, and debt service funds. *Table 5.3.1* describes general governmental revenues by source. *Table 5.3.2* describes general governmental expenditures by major function.

The general fund accounts for resources that are not required to be accounted for in other funds. Special revenue funds are used to account for the proceeds of a specific revenue source, other than expendable trusts or major capital projects, which are legally restricted to expenditures for specified purposes. Now included in the general fund are two major funds/activities that were previously accounted for in special revenue funds: hotel tax and work order funds. All other previous special revenue funds remain in the new fund structure as special revenue funds. The debt service funds account for the accumulation of property taxes and other revenue for periodic payment of interest and principal on general obligation and lease revenue bonds and related authorized costs. There are no changes in the fund structure of this fund type.

Other city funds not included are capital project funds, proprietary fund types, and fiduciary fund types. Proprietary funds consist of enterprise and internal service funds. Fiduciary funds consist of pension trust, non-expendable trust funds, and expendable trust funds.

Table 5.3.1 general governmental revenues are presented by major source while *Table 5.3.2* presents them by government function for fiscal year 2012-2013. Major revenue sources are property taxes; business taxes; other local taxes; licenses, fines and penalties; interest and investment income; rents and concessions; intergovernmental; and charges for services. The major functions of general governmental expenditures include public protection; public works, transportation, and commerce; human welfare and neighborhood development; community health; culture and recreation; general administration and finance; debt service; and capital outlay.

Table 5.1.1 (next page)

TOTAL ANNUAL WAGES BY LAND USE CATEGORY, 2005-2014

This table contains the amount of wages paid to workers in each of the five major non-residential land use categories in San Francisco. Data is presented from 2005-2014, (see Section 1.2 - Data Formats for a description of land use categories and discussion of NAICS categories). Also included is the percentage distribution in each year and the annual change within each land use category. The data are also presented graphically below in Figures 5.1.1a (a snapshot of job distribution in 2013) and 5.1.1b (a look at ten-year trends).

Notes:

- Totals from 2006-2014 also include wages from some unclassified land uses.
- Due to rounding, figures may not add to the total shown.
- PDR = Production/Distribution/Repair
- CIE = Cultural/Institutional/Educational
- Pvt HH = Private Household employment
- Prior to 2009, Private Households were counted under the CIE land use category.

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department
- CPl-U for the San Francisco-Oakland-San Jose Metropolitan Statistical Area from the US Bureau of Labor Statistics

Nominal – Non-Adjusted for Inflation (\$ 000s)

Land Use Category	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Office	\$19,229,061	\$22,250,471	\$24,711,750	\$25,544,356	\$23,203,283	\$24,028,220	\$26,733,245	\$28,914,202	\$31,429,114	\$36,255,578
Retail	\$2,841,746	\$2,942,479	\$3,210,333	\$3,233,372	\$3,020,532	\$3,139,383	\$3,333,231	\$3,638,752	\$3,915,844	\$4,185,695
PDR	\$5,550,920	\$5,753,421	\$6,340,182	\$6,319,130	\$5,897,953	\$5,868,508	\$6,007,279	\$6,852,515	\$7,137,839	\$7,928,621
Hotel	\$613,242	\$671,000	\$704,872	\$764,622	\$695,174	\$691,582	\$736,805	\$740,550	\$803,545	\$778,152
CIE	\$5,911,782	\$6,380,066	\$6,817,418	\$7,325,473	\$7,249,460	\$7,541,484	\$7,858,454	\$8,406,144	\$8,959,560	\$9,462,599
Pvt HH	-	-	-	-	\$375,303	\$314,522	\$286,029	\$293,476	\$75,279	\$267,581
TOTAL	\$34,149,207	\$37,998,504	\$41,805,696	\$43,316,200	\$40,441,705	\$41,667,560	\$45,112,659	\$48,993,364	\$52,480,447	\$58,876,225

Inflation-Adjusted (2014 \$ 000s)

Land Use Category	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Office	\$23,904,464	\$26,801,076	\$28,822,254	\$28,894,740	\$26,056,192	\$26,617,918	\$28,863,176	\$30,402,442	\$32,322,131	\$36,255,578
Retail	\$3,532,696	\$3,544,267	\$3,744,333	\$3,657,459	\$3,391,915	\$3,477,737	\$3,598,801	\$3,826,042	\$4,027,107	\$4,185,695
PDR	\$6,900,586	\$6,930,095	\$7,394,795	\$7,147,944	\$6,623,123	\$6,501,000	\$6,485,900	\$7,205,220	\$7,340,652	\$7,928,621
Hotel	\$762,347	\$808,231	\$822,119	\$864,909	\$780,648	\$786,119	\$795,509	\$778,666	\$826,376	\$778,152
CIE	\$7,349,188	\$7,684,900	\$7,951,414	\$8,286,278	\$8,140,802	\$8,354,285	\$8,484,565	\$8,838,815	\$9,255,271	\$9,462,599
Pvt HH	-	-	-	-	\$421,448	\$441,318	\$476,991	\$463,911	\$200,072	\$267,581
TOTAL	\$42,452,333	\$45,771,620	\$48,736,200	\$48,875,988	\$45,414,127	\$46,158,378	\$48,706,943	\$51,515,096	\$53,971,608	\$58,876,225

Annual Percentage Distribution

Land Use Category	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Office	56.3	58.6	59.1	59.1	57.4	57.7	59.3	59.0	59.9	61.6
Retail	8.3	7.7	7.7	7.5	7.5	7.5	7.4	7.4	7.5	7.1
PDR	16.3	15.1	15.2	14.6	14.6	14.1	13.3	14.0	13.6	13.5
Hotel	1.8	1.8	1.7	1.8	1.7	1.7	1.6	1.5	1.5	1.3
CIE	17.3	16.8	16.3	17.0	17.9	18.1	17.4	17.2	17.1	16.1
Pvt HH	-	-	-	-	0.9	1.0	1.0	0.9	0.4	0.5
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	2006/05	2007/06	2008/07	2009/08	2010/09	2011/10	2012/11	2013/12	2014/13
Office	12.1	7.5	0.3	-9.8	2.2	8.4	5.3	6.3	12.2
Retail	0.3	5.6	-2.3	-7.3	2.5	3.5	6.3	5.3	3.9
PDR	0.4	6.7	-3.3	-7.3	-1.8	-0.2	11.1	1.9	8.0
Hotel	6.0	1.7	5.2	9.7	1.9	3.8	-2.1	6.1	5.8
CIE	4.6	3.5	4.2	-1.8	2.6	1.6	4.2	4.7	2.2
Pvt HH	-	-	-	-	4.7	8.5	-3.1	56.9	33.7
TOTAL	7.8	6.5	0.3	-7.1	1.6	5.5	5.8	4.6	9.1

Figure 5.1.1a
TOTAL ANNUAL WAGES BY LAND USE CATEGORY, 2014

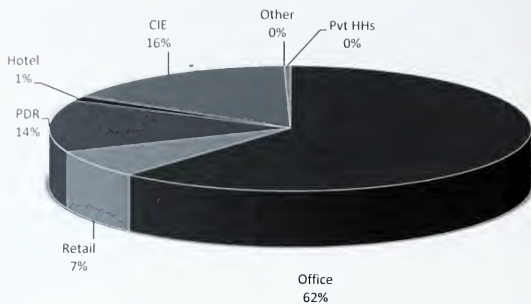


Figure 5.1.1b
TOTAL ANNUAL WAGES BY LAND USE CATEGORY, 2005–2014

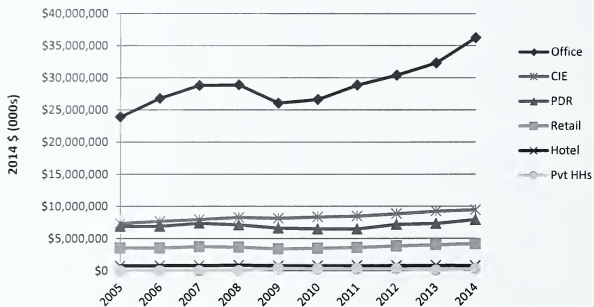


Table & Figure 5.1.2
ANNUAL WAGES PER WORKER BY LAND USE CATEGORY, 2005-2014

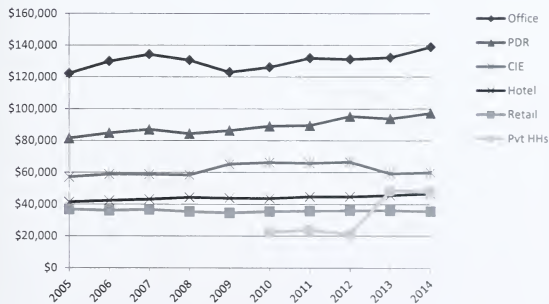
This table conveys the change in pay per worker. It is based on the wages (Table 5.1.1) and employment data (Table 3.1) previously presented in this document. This information is shown graphically in Figure 5.1.2

Wages per Worker (2014 \$)

Land Use Category	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Office	\$122,260	\$129,931	\$134,269	\$130,598	\$122,973	\$126,121	\$131,893	\$131,097	\$132,326	\$138,923
Retail	\$36,786	\$36,058	\$36,618	\$35,357	\$34,513	\$35,437	\$35,774	\$35,991	\$36,035	\$35,559
PDR	\$81,478	\$84,825	\$87,012	\$84,381	\$86,321	\$89,095	\$89,503	\$95,261	\$93,829	\$97,261
Hotel	\$41,378	\$42,345	\$43,110	\$44,293	\$43,788	\$43,609	\$44,704	\$44,751	\$45,566	\$46,747
CIE	\$57,092	\$58,823	\$58,742	\$58,417	\$65,215	\$66,195	\$65,764	\$66,532	\$59,269	\$59,894
Pvt HH	-	-	-	-	\$21,676	\$22,267	\$23,564	\$20,938	\$48,644	\$47,808
Average	\$81,109	\$85,395	\$87,603	\$85,630	\$82,723	\$84,578	\$87,126	\$87,871	\$88,094	\$91,940

Percentage Change

Land Use Category	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
Office	6.3	3.3	-2.7	-5.8	2.6	4.6	-0.6	0.9	5.0
Retail	-2.0	1.6	-3.4	-2.4	2.7	1.0	0.6	0.1	-1.3
PDR	4.1	2.6	-3.0	2.3	3.2	0.5	6.4	-1.5	3.7
Hotel	2.3	1.8	2.7	-1.1	-0.4	2.5	0.1	1.8	2.6
CIE	3.0	-0.1	-0.6	11.6	1.5	-0.7	1.2	-10.9	1.1
Pvt HH	-	-	-	-	2.7	5.8	-11.1	132.3	-1.7
TOTAL	5.3	2.6	-2.3	-3.4	2.2	3.0	0.9	0.3	4.4



Note: PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational; Pvt HH = Private Household employment

Sources: Employees from Table 3.1 of this report; Wages from Table 5.1.1 of this report

Table 5.2.1

This is a table of taxable sales in San Francisco for the last ten years. The first table shows the amount of dollars as recorded each year, and the second shows this amount adjusted to reflect inflation. This information is presented graphically in Figure 5.2.1.

Nominal - Non-Adjusted for Inflation (\$ 000s)

Type of Sales	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
All Retail Sales	\$9,049,788	\$9,588,520	\$10,006,572	\$9,804,636	\$8,511,146	\$8,971,759	\$9,939,895	\$10,883,271	\$11,869,555	\$12,769,850
All Outlets	\$13,025,974	\$13,892,188	\$14,614,736	\$14,837,689	\$12,633,575	\$13,443,121	\$14,890,527	\$15,953,605	\$17,094,163	\$18,774,333

Inflation-Adjusted (2014 \$ 000s)

Type of Sales	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
All Retail Sales	\$11,250,177	\$11,549,537	\$11,671,046	\$11,090,607	\$9,557,615	\$9,938,711	\$10,731,842	\$11,443,443	\$12,206,812	\$12,769,850
All Outlets	\$16,193,143	\$16,733,380	\$17,045,722	\$16,783,792	\$14,186,909	\$14,891,985	\$16,076,908	\$16,774,752	\$17,579,871	\$18,774,333

Percentage Change

Type of Sales	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
All Retail Sales	2.7%	1.1%	-5.0%	-13.8%	4.0%	8.0%	6.6%	6.7%	4.6%
All Outlets	3.3%	1.9%	-1.5%	-15.5%	5.0%	8.0%	4.3%	4.8%	6.8%

Sources:

- California State Board of Equalization, Taxable Sales in California
- CPI-U for the San Francisco-Oakland-San Jose Metropolitan Statistical Area from the US Bureau of Labor Statistics
- Additional calculations by the San Francisco Planning Department

Figure 5.2.1
TAXABLE RETAIL SALES AND ALL OUTLET SALES, 2005–2014 (2014 \$000s)

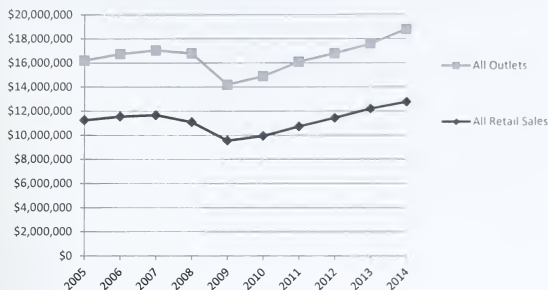


Table 5.2.2
TAXABLE RETAIL SALES & SALES TAX PERMITS BY TYPE OF OUTLET, 2014

This table looks more closely at the type of retail sales that occurred in 2014, as well as the number of sales permits issued in that time.

Type of Retail Sales	Sales Tax Permits	Taxable Sales Transactions (\$ 000s)
Apparel Stores	2,314	\$2,164,591
General Merchandise	252	\$883,868
Food Stores	1,212	\$779,185
Eating & Drinking	4,660	\$4,145,026
Home Furnishings & Appliances	1,045	\$986,563
Building Materials	306	\$522,045
Service Stations	117	\$653,541
Automotive Dealers and Supplies	203	\$617,362
Other Retail Stores	9,033	\$2,015,387
TOTAL RETAIL STORES	19,144	\$12,769,850
TOTAL OUTLETS	27,958	\$18,774,333

Notes:

- Other Retail Stores include:
 - Packaged liquor stores
 - Second hand merchandise
 - Farm and garden supply stores
 - Fuel and ice dealers
 - Mobile homes, trailers, and campers
 - Boat, motorcycle, and plane dealers
 - Specialty store group
- In other derivations of BCE sales, all other retail stores, including farm implements

Sources:

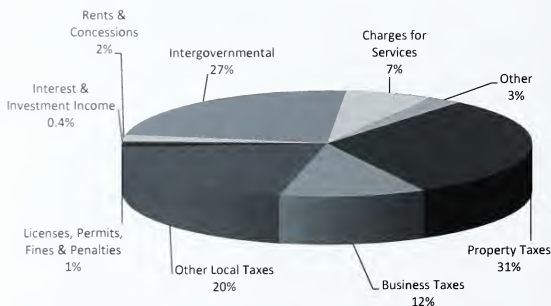
- California State Board of Equalization, Taxable Sales in California
- Additional calculations by the San Francisco Planning Department

Table & Figure 5.3.1

SAN FRANCISCO GOVERNMENT GENERAL REVENUE BY SOURCE, FISCAL YEAR 2014

Table 5.3.1 conveys the expenditures by the City and County of San Francisco in Fiscal Year 2014. This data is shown graphically in Figure 5.3.1.

Revenue Source	Amount (\$ 000s)	% Distribution
Property Taxes	\$1,517,261	31.1
Business Taxes	\$563,406	11.6
Other Local Taxes	\$986,136	20.2
Licenses, Permits, Fines & Penalties	\$70,796	1.5
Interest & Investment Income	\$21,678	0.4
Rents & Concessions	\$90,712	1.9
Intergovernmental	\$1,157,457	23.7
Federal	\$426,314	8.7
State	\$721,735	14.8
Other -	\$9,408	0.2
Charges for Services	\$333,904	6.8
Other	\$134,923	2.8
TOTAL	\$4,876,273	100.0



Note: Fiscal Year 2013 runs from July 1, 2012 to June 30, 2013

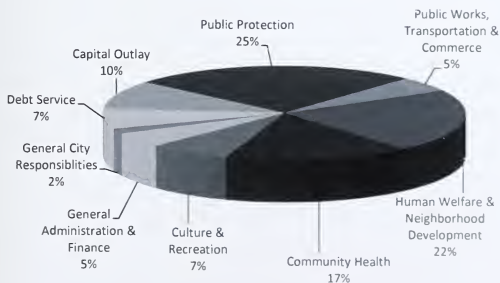
Source: San Francisco Controller, Comprehensive Annual Financial Report.

Table & Figure 5.3.2

SAN FRANCISCO GOVERNMENT GENERAL EXPENDITURES BY FUNCTION, FISCAL YEAR 2014

Table 5.3.1 conveys the revenues for the City and County of San Francisco in Fiscal Year 2014. This data is shown graphically in Figure 5.3.2.

<i>Expenditure Function</i>	<i>Amount (\$000's)</i>	<i>% of Total Amount</i>
Public Protection	\$1,172,497	25.6
Public Works, Transportation & Commerce	\$232,005	5.1
Human Welfare & Neighborhood Development	\$995,192	21.8
Community Health	\$761,439	16.6
Culture & Recreation	\$331,914	7.3
General Administration & Finance	\$233,977	5.1
General City Responsibilities	\$86,996	1.9
Debt Service	\$311,593	6.8
Capital Outlay	\$449,726	9.8
TOTAL	\$4,575,339	100.00



Note: Fiscal Year 2013 runs from July 1, 2012 to June 30, 2013

Source: San Francisco Controller, Comprehensive Annual Financial Report



Photo by Petar Iliev

6.0 Building and Land Use

The tables and graphs in this chapter present information about building permit applications for 2005 through 2014, as well as land use data for 2014. Building permit applications are filed at the City and County of San Francisco Department of Building Inspection (DBI) for construction of new buildings, demolitions, and alterations to existing structures. The number of permits, status of applications, and cost of projects are measures of construction activity in San Francisco, which accounts for approximately 20% of employment annually over the past 10 years. All information for this section was provided by DBI and has been reviewed and tabulated by Planning Department staff.

6.1 BUILDING

The discussion of building in San Francisco is presented in five sub-sections, 6.1 through 6.5 as follows: (1) All Permits & Costs by Land Use District (10 years); (2) All Permits & Costs by C&I District (10 years); (3) All Permits & Costs by C&I District and Land Use Categories (current year); (4) Permit Status by C&I District and Land Use Categories (current year); (5) Total Office Space (10 years).

Sections 6.1 and 6.2. Data are reported by the year that a project was filed with the Department of Building Inspection. Although all filed applications may not ultimately lead to completed projects, trends in the number of building permit applications filed are an important economic indicator. Construction activity and spending is a gauge of business confidence. Economic health is measured, among other things, by housing starts. Residential construction often leads commercial activity by about a year. Construction activity and its attendant costs generate jobs and wages, which in turn stimulate spending and consumption throughout the local economy.

In Section 6.1, data are reported by Land Use Category; in Section 6.2, these data are reported by Commerce and Industry (C&I) District. For further information on Land Use Categories and C&I Districts, refer to the Data Formats section in Appendix Chapter 1.

Tables in these sections are subdivided into three groups (1) all building permits, (2) building permits for new construction activity, and (3) building permits for alterations and demolitions. In turn, each group contains tables that report information on permits, total construction cost, and average construction cost by year, land use and C&I District. Annual percentage distributions and annual percentage changes are reported for numbers of permit applications and total construction costs. Construction cost values are adjusted for inflation using Saylor Inc.'s *Materials/Labor Cost Index for Construction*, where 2013 is designated as the base year.

Section 6.3. Permit and construction cost data are cross-tabulated by Land Use Category and C&I District. This section includes all permit applications filed in 2013.

Section 6.4 describes permit applications by application status by Land Use Category and then by C&I District for 2013. These permit status categories are grouped into the following five major categories: (1) building permit applications that were *approved* for construction but not yet issued; (2) building permit applications that were *issued* but not completed; (3) *other* permit applications, which includes those that were not yet been acted upon, that were abandoned, reinstated, appealed, or for which no information was available; (4) building permit applications that were *cancelled*, including applications that have been withdrawn, revoked or disapproved; (5) building permit applications where the authorized work was *completed*.

The construction cost data reported in some tables are project cost estimates as reported by DBI, but are more usefully understood as estimates of construction expenditure or spending in the local and wider economy for each project. Hence, it's a measure of the size of the construction sector of the economy. Total and average construction cost data measure the scope, complexity, and extent of construction activity in San Francisco. While total construction cost indicates the extent of active permit applications, some of which are under construction in San Francisco for a particular year, average construction cost relates number of applications to total construction cost, revealing a rough estimate of project size. Construction cost data are adjusted for inflation using Saylor Inc.'s *Materials/Labor Cost Index for Construction*, where 1983 is designated as the base year (1983=100).

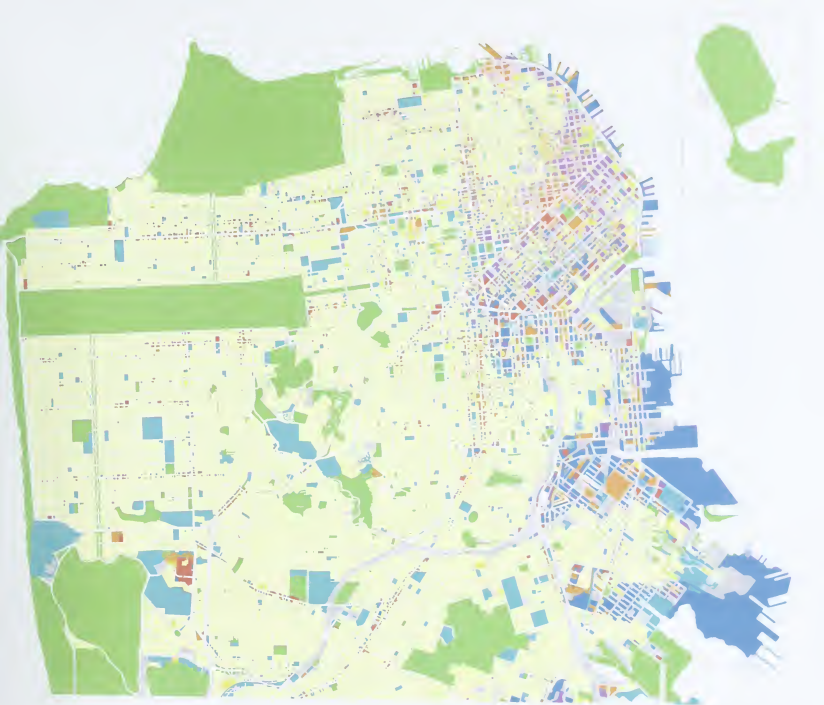
Section 6.5 reports total office space in San Francisco from 2004 to 2013. It includes absolute numbers as well as percentage changes over time. The source of these data is Cushman & Wakefield realtors.

6.2 LAND USE

Section 6.6 reports land use activity in San Francisco. Land use, for this section, is determined by incorporating both the business type on the parcel and the location of that parcel. Business data are culled from the Dun & Bradstreet databases. Dun & Bradstreet is a firm that conducts national surveys of existing businesses, gathering information that includes number of employees, square footage of businesses, and an industry classification system which best classifies those businesses. A parcel has to have 80% or more of its usable building space occupied by one specific land use in order to warrant that particular land use classification. Less than 80% in any one land use results in a Mixed Uses designation. If either the Planning Department or the Department of Building Inspection has a record of a residence on a lot, it is determined to be a Residential land use. If a lot contains a residence and a business establishment, that lot is classified as Mixed Residential.

Land Use is also determined by the location of a given parcel. The impact of location on land use classification is illustrated by the following example. If an establishment with a NAICS (North American Industry Classification System) code of 236 (Construction) is in the Financial District, it will be classified as Office use. If an establishment with the same NAICS code is located in South of Market or Bayview districts, it will be classified as PDR. Construction is generally considered part of the PDR land use classification. In the above scenario, however, the Financial District location of a construction business indicates that the business is conducting management, information, or professional services in more of an office setting and should therefore be assigned an Office land use classification.

The NAICS code for land uses under Office, Retail, PDR, Hotel, and Cultural/Institutional/ Educational (CIE) land use categories are noted in *Table 1.2*, Chapter 1. The Residential land use category data are gathered from Housing Inventory and the Department of Building Inspection's Permit Tracking System. Data on vacant sites are gathered from information supplied by the Assessor's Office. *Table 6.6* provides details on the amount of square footage (building footprint, not total) for each land use, as a predominant use on each parcel of land for 20 plan areas in San Francisco. *Map 6.2* shows the location of these 20 plan areas. *Table 6.6* is based on the information available in year 2014.



Land Use San Francisco

MAP 6.1

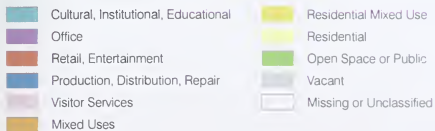


Table 6.1.1.A

ALL BUILDING PERMITS BY LAND USE CATEGORY, 2005-2014

This table presents the number of building permits filed by land use category (see Section 1.2 – Data Formats for a definition of land use categories). All building permits include new construction, alterations, and demolitions. Also included is the percentage distribution in any given year and the annual change within each land use category.

Number of Permits

Land Use Category	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Office	4,202	4,133	4,366	3,791	2,907	2,968	3,406	3,712	4,410	4,465
Retail	1,661	2,139	1,852	1,927	2,203	1,967	2,178	2,442	2,337	2,209
PDR	185	170	198	235	236	205	248	231	283	306
Hotel	144	193	253	310	260	126	198	224	249	285
CIE	356	429	459	602	547	494	541	618	696	702
Residential	19,508	19,653	19,939	18,226	15,714	15,533	15,288	15,876	17,800	18,900
Other	779	689	931	819	600	631	754	1,193	1,227	1,304
TOTAL	26,835	27,406	27,998	25,910	22,467	21,924	22,613	24,296	27,002	28,171

Annual Percentage Distribution

Land Use Category	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Office	15.7	15.1	15.6	14.6	12.9	13.5	15.1	15.3	16.3	15.8
Retail	6.2	7.8	6.6	7.4	9.8	9.0	9.6	10.1	8.7	7.8
PDR	0.7	0.6	0.7	0.9	1.1	0.9	1.1	1.0	1.0	1.1
Hotel	0.5	0.7	0.9	1.2	1.2	0.6	0.9	0.9	0.9	1.0
CIE	1.3	1.6	1.6	2.3	2.4	2.3	2.4	2.5	2.6	2.5
Residential	72.7	71.7	71.2	70.3	69.9	70.8	67.6	65.3	65.9	67.1
Other	2.9	2.5	3.3	3.2	2.7	2.9	3.3	4.9	4.5	4.6
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
Office	-1.6	5.6	-13.2	-23.3	2.1	14.8	9.0	18.8	1.2
Retail	28.8	-13.4	4.0	14.3	-10.7	10.7	12.1	-4.3	-5.5
PDR	-8.1	16.5	18.7	0.4	-13.1	21.0	-6.9	22.5	8.1
Hotel	34.0	31.1	22.5	-16.1	-51.5	57.1	13.1	11.2	14.5
CIE	20.5	7.0	31.2	-9.1	-9.7	9.5	14.2	12.6	0.9
Residential	0.7	1.5	-8.6	-13.8	-1.2	-1.6	3.8	12.1	6.2
Other	-11.6	35.1	-12.0	-26.7	5.2	19.5	58.2	2.8	6.3
TOTAL	2.1	2.2	-7.5	-13.3	-2.4	3.1	7.4	11.1	4.3

Notes: PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.1.1.B

TOTAL CONSTRUCTION COSTS FOR ALL BUILDING PERMITS BY LAND USE CATEGORY, 2005–2014

This table presents the total cost of construction associated with building permits filed by land use category. For consistency with previous C&I reports, costs are adjusted for inflation, with 2013 being the base year. Also included is the percentage distribution in any given year and the annual change within each land use category.

Total Construction Costs (Inflation-Adjusted 2014 \$ 000s)

Land Use Category	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Office	\$652,446	\$876,011	\$1,080,529	\$533,580	\$313,980	\$418,743	\$1,020,734	\$1,133,809	\$1,621,296	\$1,150,302
Retail	\$126,610	\$188,440	\$229,492	\$184,768	\$102,066	\$305,922	\$197,660	\$323,642	\$198,563	\$141,979
PDR	\$19,508	\$25,004	\$55,157	\$29,889	\$25,348	\$13,607	\$18,111	\$18,634	\$34,481	\$45,479
Hotel	\$40,658	\$83,194	\$80,600	\$44,214	\$28,542	\$21,977	\$58,316	\$33,948	\$116,289	\$97,799
CIE	\$82,554	\$153,052	\$122,959	\$132,089	\$90,836	\$223,161	\$188,927	\$336,251	\$160,123	\$370,738
Residential	\$2,588,460	\$1,677,745	\$1,271,628	\$893,701	\$748,569	\$1,420,078	\$1,654,958	\$2,358,642	\$3,300,463	\$2,933,999
Other	\$11,156	\$49,302	\$33,603	\$13,605	\$9,596	\$11,638	\$503,260	\$138,995	\$124,075	\$84,233
TOTAL	\$3,521,391	\$3,052,747	\$2,873,968	\$1,831,845	\$1,318,938	\$2,415,127	\$3,641,965	\$4,343,921	\$5,555,290	\$4,824,529

Annual Percentage Distribution

Land Use Category	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Office	18.5	28.7	37.6	29.1	23.8	17.3	28.0	26.1	29.2	23.8
Retail	3.6	6.2	8.0	10.1	7.7	12.7	5.4	7.5	3.6	2.9
PDR	0.6	0.8	1.9	1.6	1.9	0.6	0.5	0.4	0.6	0.9
Hotel	2.3	5.0	4.3	7.2	6.9	9.2	5.2	7.7	2.9	2.0
CIE	1.2	2.7	2.8	2.4	2.2	0.9	1.6	0.8	2.1	7.7
Residential	73.5	55.0	44.2	48.8	56.8	58.8	45.4	54.3	59.4	60.8
Other	0.3	1.6	1.2	0.7	0.7	0.5	13.8	3.2	2.2	1.7
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
Office	34.3	23.3	-50.6	-41.2	33.4	143.8	11.1	43.0	-29.1
Retail	48.8	21.8	-19.5	-44.8	199.7	-35.4	63.7	-38.6	-28.5
PDR	28.2	120.6	-45.8	-15.2	-46.3	33.1	2.9	85.0	31.9
Hotel	85.4	-19.7	7.4	-31.2	145.7	-15.3	78.0	-52.4	-15.9
CIE	104.6	-3.1	-45.1	-35.4	-23.0	165.4	-41.8	242.6	131.5
Residential	-35.2	-24.2	-29.7	-16.2	89.7	16.5	42.5	39.9	-11.1
Other	341.9	-31.8	-59.5	-29.5	21.3	4224.4	-72.4	-10.7	-32.1
TOTAL	-13.3	-5.9	-36.3	-28.0	83.1	50.8	19.3	27.9	-13.2

Notes: PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational

Sources: San Francisco Planning Department; Department of Building Inspection

1. The large increase in 'Other' construction spending in 2011 is due to permits filed for the Transbay Terminal, a transportation facility

Table 6.1.1.C

AVERAGE CONSTRUCTION COSTS FOR ALL BUILDING PERMITS BY LAND USE CATEGORY, 2005-2014

This table presents the average construction cost for all building permits filed by land use category. It represents the total costs (Table 6.1.1.B) divided by the total permits (Table 6.1.1.A).

Average Construction Costs (Inflation-Adjusted 2014 \$ 000s)

Land Use Category	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Office	\$155.3	\$212.0	\$247.5	\$140.7	\$108.0	\$141.1	\$299.7	\$305.4	\$367.6	\$257.6
Retail	\$76.2	\$88.1	\$123.9	\$95.9	\$46.3	\$155.5	\$90.8	\$132.5	\$85.0	\$64.3
PDR	\$105.4	\$147.1	\$278.6	\$127.2	\$107.4	\$66.4	\$73.0	\$80.7	\$121.8	\$148.6
Hotel	\$282.3	\$431.1	\$318.6	\$142.6	\$109.8	\$174.4	\$294.5	\$151.6	\$467.0	\$343.2
CIE	\$231.9	\$356.8	\$267.9	\$219.4	\$166.1	\$451.7	\$349.2	\$544.1	\$230.1	\$528.1
Residential	\$132.7	\$85.4	\$63.8	\$49.0	\$47.6	\$91.4	\$108.3	\$148.6	\$185.4	\$155.2
Other	\$14.3	\$71.6	\$36.1	\$16.6	\$16.0	\$18.4	\$667.5	\$116.5	\$101.1	\$64.6
Average	\$131.2	\$111.4	\$102.6	\$70.7	\$58.7	\$110.2	\$161.1	\$178.8	\$205.7	\$171.3

Percentage Change

Land Use Category	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
Office	36.5	16.8	-43.1	-23.3	30.6	112.4	1.9	20.4	-29.9
Retail	15.6	40.7	-22.6	-51.7	235.7	-41.6	46.0	-35.9	-24.4
PDR	39.5	89.4	-54.3	-15.6	-38.2	10.0	10.5	51.0	22.0
Hotel	52.7	-26.1	-55.2	-23.0	58.9	68.9	-48.5	208.2	-26.5
CIE	53.8	-24.9	-18.1	-24.3	172.0	-22.7	55.8	-57.7	129.6
Residential	-35.7	-25.3	-23.1	-2.8	91.9	18.4	37.2	24.8	-16.3
Other	399.7	-49.6	-54.0	-3.7	15.3	3518.9	-82.5	-13.2	-36.1
TOTAL	-15.1	-7.8	-31.1	-17.0	87.6	46.2	11.0	15.1	-16.8

Notes: PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.1.2.A

BUILDING PERMITS FOR NEW CONSTRUCTION BY LAND USE CATEGORY, 2005-2014

This table presents the number of building permits filed for new construction by land use category. Also included is the percentage distribution in any given year and the annual change within each land use category.

Number of Permits

Land Use Category	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Office	6	5	11	9	0	1	8	9	8	7
Retail	10	10	8	5	6	10	9	10	8	10
PDR	4	13	7	13	4	5	5	5	9	7
Hotel	0	1	0	0	0	0	1	0	2	1
CIE	5	18	11	5	5	8	3	13	10	5
Residential	260	179	150	101	63	92	58	148	155	225
Other	0	4	1	0	3	0	9	15	9	5
TOTAL	265	288	225	285	230	116	93	200	201	260

Annual Percentage Distribution

Land Use Category	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Office	2.3	1.7	4.9	3.2	0.0	0.9	8.6	4.5	4.0	2.7
Retail	3.8	3.5	3.6	1.8	2.6	8.6	9.7	5.0	4.0	3.8
PDR	1.5	4.5	3.1	4.6	1.7	4.3	5.4	2.5	4.5	2.7
Hotel	0.0	0.3	0.0	0.0	0.0	0.0	1.1	0.0	1.0	0.4
CIE	1.9	6.3	4.9	1.8	2.2	6.9	3.2	6.5	5.0	1.9
Residential	98.1	62.2	66.7	35.4	27.4	79.3	62.4	74.0	77.1	86.5
Other	0.0	1.4	0.4	0.0	1.3	0.0	9.7	7.5	4.5	1.9
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
Office	-16.7	120.0	-18.2	-100.0	--	700.0	12.5	-11.1	-12.5
Retail	0.0	-20.0	-37.5	20.0	66.7	-10.0	11.1	-20.0	25.0
PDR	225.0	-46.2	85.7	-69.2	25.0	0.0	0.0	80.0	-22.2
Hotel	--	-100.0	--	--	--	--	-100.0	--	-50.0
CIE	260.0	-38.9	-54.5	0.0	60.0	-62.5	333.3	-23.1	-50.0
Residential	-31.2	-16.2	-32.7	-37.6	46.0	-37.0	155.2	4.7	45.2
Other	--	-75.0	-100.0	--	-100.0	--	66.7	-40.0	44.4
TOTAL	8.7	-21.9	26.7	-19.3	-49.6	-19.8	115.1	0.5	29.4

Notes: PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.1.2.B

TOTAL CONSTRUCTION COSTS FOR NEW CONSTRUCTION BY LAND USE CATEGORY, 2005-2014

This table presents the total cost of new construction associated with building permits filed by land use category over the last ten years. For consistency with previous C&I reports, costs are adjusted for inflation, with 2014 being the base year. Also included is the percentage distribution in any given year and the annual change within each land use category.

Total Construction Costs (Inflation-Adjusted 2014 \$ 000s)

Land Use Category	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Office	\$158,267	\$315,494	\$364,564	\$116,625	\$0	\$4,157	\$422,731	\$437,373	\$483,491	\$560,120
Retail	\$11,105	\$1,391	\$55,848	\$63,653	\$4,587	\$134,771	\$43,021	\$80,584	\$4,251	\$8,451
PDR	\$1,151	\$7,789	\$38,215	\$13,519	\$2,081	\$639	\$767	\$632	\$19,270	\$19,575
Hotel	\$0	\$14,330	\$0	\$0	\$0	\$0	\$27,779	\$0	\$51,364	\$32,000
CIE	\$19,496	\$41,445	\$23,464	\$25,627	\$24,288	\$140,728	\$20,177	\$126,230	\$28,611	\$4,238
Residential	\$1,863,459	\$1,067,301	\$507,100	\$250,005	\$256,189	\$842,582	\$1,211,097	\$1,741,344	\$2,206,243	\$2,196,109
Other	\$0	\$0	\$323	\$0	\$21	\$0	\$486,236	\$169,666	\$14,342	\$25,000
TOTAL	\$2,053,478	\$1,447,749	\$989,515	\$469,430	\$287,166	\$1,122,877	\$2,211,809	\$2,555,830	\$2,807,570	\$2,645,492

Annual Percentage Distribution

Land Use Category	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Office	7.7	21.8	36.8	24.8	0.0	0.4	19.1	17.1	17.2	13.6
Retail	0.5	0.1	5.6	13.6	1.6	12.0	1.9	3.2	0.2	0.3
PDR	0.1	0.5	3.9	2.9	0.7	0.1	0.0	0.0	0.7	0.7
Hotel	0.0	1.0	0.0	0.0	0.0	0.0	1.3	0.0	1.8	1.2
CIE	0.9	2.9	2.4	5.5	8.5	12.5	0.9	4.9	1.0	0.2
Residential	90.7	73.7	51.2	53.3	89.2	75.0	54.8	68.1	78.6	83.0
Other	0.0	0.0	0.0	0.0	0.0	0.0	22.0	6.6	0.5	0.9
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
Office	99.3	15.6	-68.0	-100.0	--	10,069.2	3.5	10.5	-25.5
Retail	-87.5	3,915.2	14.0	-92.8	2,837.9	-68.1	87.3	-94.7	98.8
PDR	576.5	390.7	-64.6	-84.6	-69.3	20.2	-17.6	2,949.1	1.6
Hotel	--	-100.0	--	--	--	--	-100.0	--	-37.7
CIE	112.6	-43.4	9.2	-5.2	479.4	-85.7	525.6	-77.3	-85.2
Residential	-42.7	-52.5	-50.7	2.5	228.9	43.7	43.8	26.7	-0.5
Other	--	--	-100.0	--	-100.0	--	-65.1	-91.5	74.3
TOTAL	-29.5	-31.7	-52.6	-38.8	291.0	97.0	15.6	9.8	-5.8

Notes:

- PDR = Production/Distribution/Repair
- CIE = Cultural/Institutional/Educational

Sources:

San Francisco Planning Department, Department of Building Inspection

Table 6.1.2.C

**AVERAGE
CONSTRUCTION
COSTS FOR NEW
CONSTRUCTION BY
LAND USE CATEGORY,
2005-2014**

This table presents the average cost of new construction for all building permits filed by land use category. It represents the total costs (Table 6.1.2.b) divided by the total permits (Table 6.1.2.a).

Land Use Category	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Office	\$26,378	\$63,099	\$33,142	\$12,958	--	\$4,157	\$52,841	\$48,597	\$60,436	\$51,446
Retail	\$1,111	\$139	\$6,981	\$12,731	\$765	\$13,477	\$4,780	\$8,058	\$531	\$845
PDR	\$288	\$599	\$5,459	\$1,040	\$520	\$128	\$153	\$126	\$2,141	\$2,796
Hotel	--	\$14,330	--	--	--	--	\$27,779	--	\$25,682	\$32,000
CIE	\$3,899	\$2,303	\$2,133	\$5,125	\$4,858	\$17,591	\$6,726	\$9,710	\$2,861	\$848
Residential	\$7,167	\$5,963	\$3,381	\$2,475	\$4,066	\$9,159	\$20,881	\$11,766	\$14,234	\$9,760
Other	--	\$0	\$323	#DIV/0!	\$7	--	\$54,026	\$11,311	\$1,594	\$5,000
TOTAL	\$7,749	\$5,027	\$4,398	\$1,647	\$1,249	\$9,680	\$23,783	\$12,779	\$13,968	\$10,175

Percentage Change

Land Use Category	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
Office	139.2	-47.5	-60.9	--	--	1,171.1	-8.0	24.4	-14.9
Retail	-87.5	4,919.0	82.4	-94.0	1,662.7	-84.5	68.6	-93.4	59.0
PDR	108.2	811.2	-81.0	-50.0	-75.5	20.2	-17.6	1,593.9	30.6
Hotel	--	--	--	--	--	--	--	--	24.6
CIE	-40.9	-7.4	140.3	-5.2	262.1	-61.8	44.4	-70.5	-70.4
Residential	-16.8	-43.3	-26.8	64.3	125.2	128.0	-43.7	21.0	-31.4
Other	--	--	--	--	--	--	-79.1	-85.9	213.8
TOTAL	-35.1	-12.5	-62.5	-24.2	675.3	145.7	-46.3	9.3	-27.2

Notes: PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational
Sources: San Francisco Planning Department, Department of Building Inspection

Table 6.1.3.A

BUILDING PERMITS FOR ALTERATIONS AND DEMOLITIONS BY LAND USE CATEGORY, 2005–2014

This table presents the number of building permits filed for alterations and demolitions by land use category. Also included is the percentage distribution in any given year and the annual change within each land use category.

Number of Permits

Land Use Category	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Office	4,196	4,128	4,355	3,782	2,907	2,967	3,398	3,704	4,402	4,458
Retail	1,651	2,129	1,844	1,922	2,197	1,955	2,168	2,432	2,329	2,199
PDR	181	157	191	222	232	200	243	226	274	299
Hotel	144	192	253	310	260	126	197	224	247	284
CIE	351	411	448	597	542	486	538	606	686	697
Residential	19,249	19,474	19,789	18,125	15,651	15,441	15,230	15,728	17,645	18,675
Other	379	264	335	270	218	212	271	328	462	580
TOTAL	26,151	26,755	27,215	25,228	22,007	21,387	22,045	23,248	26,045	27,192

Annual Percentage Distribution

Land Use Category	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Office	16.0	15.4	16.0	15.0	13.2	13.9	15.4	15.9	16.9	16.4
Retail	6.3	8.0	6.8	7.6	10.0	9.1	9.8	10.5	8.9	8.1
PDR	0.7	0.6	0.7	0.9	1.1	0.9	1.1	1.0	1.1	1.1
Hotel	0.6	0.7	0.9	1.2	1.2	0.6	0.9	1.0	0.9	1.0
CIE	1.3	1.5	1.6	2.4	2.5	2.3	2.4	2.6	2.6	2.6
Residential	73.6	72.8	72.7	71.8	71.1	72.2	69.1	67.7	67.7	68.7
Other	1.4	1.0	1.2	1.1	1.0	1.0	1.2	1.4	1.8	2.1
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
Office	-1.6	5.5	-13.2	-23.1	2.1	14.5	9.0	18.8	1.3
Retail	29.0	-13.4	4.2	14.3	-11.0	10.9	12.2	-4.2	-5.6
PDR	-13.3	21.7	16.2	4.5	-13.8	21.5	-7.0	21.2	9.1
Hotel	33.3	31.8	22.5	-16.1	-51.5	56.3	13.7	10.3	15.0
CIE	17.1	9.0	33.3	-9.2	-10.3	10.7	12.6	13.2	1.6
Residential	1.2	1.6	-8.4	-13.6	-1.3	-1.4	3.3	12.2	5.8
Other	-30.3	26.9	-19.4	-19.3	-2.8	27.8	21.0	40.9	25.5
TOTAL	2.3	1.7	-7.3	-12.8	-2.8	3.1	5.5	12.0	4.4

Notes: PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.1.3.B

TOTAL CONSTRUCTION COSTS FOR ALTERATIONS AND DEMOLITIONS BY LAND USE CATEGORY, 2005-2014

This table presents the total cost of construction associated with building permits filed for alterations and demolitions by land use category. For consistency with previous C&I reports, costs are adjusted for inflation, with 2013 being the base year. Also included is the percentage distribution in any given year and the annual change within each land use category.

Total Construction Costs (Inflation-Adjusted 2014 \$ 000s)

Land Use Category	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Office	\$494,179	\$560,517	\$715,965	\$416,954	\$313,980	\$414,586	\$598,003	\$696,436	\$1,137,809	\$790,182
Retail	\$115,504	\$187,049	\$173,644	\$121,114	\$97,479	\$171,147	\$154,637	\$243,058	\$194,313	\$133,329
PDR	\$18,356	\$17,216	\$16,942	\$16,370	\$23,267	\$12,969	\$17,344	\$18,002	\$15,211	\$25,904
Hotel	\$40,658	\$68,864	\$80,600	\$44,214	\$28,542	\$21,977	\$30,538	\$33,948	\$64,926	\$65,799
CIE	\$63,058	\$111,607	\$99,495	\$106,462	\$66,548	\$82,433	\$168,750	\$210,021	\$131,512	\$366,800
Residential	\$725,002	\$610,444	\$764,528	\$643,696	\$492,381	\$577,496	\$443,860	\$617,298	\$1,094,220	\$797,861
Other	\$3,855	\$9,628	\$8,445	\$6,854	\$5,156	\$5,754	\$11,083	\$150,965	\$68,655	\$35,206
TOTAL	\$1,460,612	\$1,565,325	\$1,859,619	\$1,355,664	\$1,027,353	\$1,286,362	\$1,424,215	\$1,969,728	\$2,706,643	\$2,155,979

Annual Percentage Distribution

Land Use Category	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Office	33.8	35.8	38.5	30.8	30.6	32.2	42.0	35.4	42.0	36.7
Retail	7.9	11.9	9.3	8.9	9.5	13.3	10.9	12.3	7.2	6.2
PDR	1.3	1.1	0.9	1.2	2.3	1.0	1.2	0.9	0.6	1.2
Hotel	2.8	4.4	4.3	3.3	2.8	1.7	2.1	1.7	2.4	3.1
CIE	4.3	7.1	5.4	7.9	6.5	6.4	11.8	10.7	4.9	17.0
Residential	49.6	39.0	41.1	47.5	47.9	44.9	31.2	31.3	40.4	34.2
Other	0.3	0.6	0.5	0.5	0.5	0.4	0.8	7.7	2.5	1.6
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
Office	13.4	27.7	-41.8	-24.7	32.0	44.2	16.5	63.4	-30.6
Retail	61.9	-7.2	-30.3	-19.5	75.6	-9.6	57.2	-20.1	-31.3
PDR	-6.2	-1.6	-3.4	42.1	-44.3	33.7	3.8	-15.5	70.3
Hotel	69.4	17.0	-45.1	-35.4	-23.0	39.0	11.2	91.3	1.3
CIE	77.0	-10.9	7.0	-37.5	23.9	104.7	24.5	-37.4	178.7
Residential	-15.8	25.2	-15.8	-23.5	17.3	-23.1	39.1	77.3	-32.6
Other	149.8	-12.3	-18.8	-24.8	11.6	92.6	262.1	-54.5	-48.6
TOTAL	7.2	18.8	-27.1	-24.2	25.2	10.7	38.3	37.4	-20.4

Notes: PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.1.3.C

AVERAGE CONSTRUCTION COSTS FOR ALTERATIONS AND DEMOLITIONS BY LAND USE CATEGORY, 2005–2014

This table presents the average construction cost for all building permits filed for alterations and demolitions by land use category. It represents the total costs (Table 6.1.3.B) divided by the total permits (Table 6.1.3.A).

Average Construction Costs (Inflation-Adjusted 2014 \$ 000s)

Land Use Category	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Office	\$117.8	\$135.8	\$164.4	\$110.2	\$108.0	\$139.7	\$176.0	\$188.0	\$258.5	\$177.3
Retail	\$70.0	\$87.9	\$94.2	\$63.0	\$44.4	\$87.5	\$71.3	\$99.9	\$83.4	\$60.7
PDR	\$101.4	\$109.7	\$88.7	\$73.7	\$100.3	\$64.8	\$71.4	\$79.7	\$55.5	\$86.6
Hotel	\$282.3	\$358.7	\$318.6	\$142.6	\$109.8	\$174.4	\$155.0	\$151.6	\$262.9	\$231.7
CIE	\$179.7	\$271.5	\$222.1	\$178.3	\$122.8	\$169.6	\$313.7	\$346.6	\$191.7	\$525.8
Residential	\$37.7	\$31.3	\$38.6	\$35.5	\$31.5	\$37.4	\$29.1	\$39.2	\$62.0	\$39.5
Other	\$10.2	\$36.5	\$25.2	\$25.4	\$23.7	\$27.1	\$40.9	\$460.3	\$148.6	\$60.8
TOTAL	\$55.9	\$58.5	\$68.3	\$53.7	\$46.7	\$60.1	\$64.6	\$84.7	\$103.9	\$79.3

Percentage Change

Land Use Category	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
Office	15.3	21.1	-32.9	-2.0	29.4	25.9	6.8	37.5	-31.4
Retail	25.6	7.2	-33.1	-29.6	97.3	-18.5	40.1	-16.5	-27.2
PDR	8.1	-19.1	-16.9	36.0	-35.3	10.1	11.6	-30.3	56.1
Hotel	27.0	-11.2	-55.2	-23.0	58.9	-11.1	-2.2	73.4	-11.9
CIE	51.2	-18.2	-19.7	-31.1	38.1	84.9	10.5	-44.7	174.3
Residential	-16.8	23.2	-8.1	-11.4	18.9	-22.1	34.7	58.0	-36.3
Other	258.5	-30.9	0.7	-6.8	14.8	50.7	1025.4	-67.7	-59.1
TOTAL	4.7	16.8	-21.4	-13.1	28.8	7.4	31.1	22.7	-23.7

Notes: PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.2.1.A ALL BUILDING PERMITS BY COMMERCE & INDUSTRY DISTRICT, 2005-2014

This table presents the number of building permits filed by Commerce & Industry District (see Section 1.2 Data Formats for a definition of Commerce & Industry Districts). All building permits include new construction, alterations, and demolition. Also included is the percentage distribution in any given year and the annual change within each Commerce & Industry District.

Number of Permits

C&I District	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Bayview	716	696	714	633	554	572	599	663	691	680
Civic Center	800	767	1,012	899	751	710	781	793	1,062	1,157
Financial	3,707	3,486	3,733	3,370	2,688	2,600	2,994	3,443	3,668	3,635
Mission	2,012	2,068	1,999	1,972	1,781	1,894	1,821	1,880	2,068	2,233
North Beach	860	840	801	832	713	649	730	709	918	872
North Central	3,612	3,853	4,054	3,506	3,202	2,981	2,916	3,221	3,493	3,675
Northwest	2,471	2,482	2,417	2,478	1,897	1,904	1,936	1,953	2,118	2,372
South of Market	2,127	2,527	2,269	2,263	2,072	1,969	2,131	2,481	2,913	3,056
Southwest	9,372	9,428	9,347	8,656	7,582	7,550	7,368	7,656	8,377	8,541
Van Ness	1,050	1,171	1,502	1,186	987	1,064	1,108	1,254	1,396	1,534
Unclassified	129	87	139	91	232	185	221	243	298	416
TOTAL	26,856	27,405	27,987	25,886	22,459	22,078	22,605	24,296	27,002	28,171

Annual Percentage Distribution

C&I District	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Bayview	2.7	2.5	2.6	2.4	2.5	2.6	2.6	2.7	2.6	2.4
Civic Center	3.0	2.8	3.6	3.5	3.3	3.2	3.5	3.3	3.9	4.1
Financial	13.8	12.7	13.3	13.0	12.0	11.8	13.2	14.2	13.6	12.9
Mission	7.5	7.5	7.1	7.6	7.9	8.6	8.1	7.7	7.7	7.9
North Beach	3.2	3.1	2.9	3.2	3.2	2.9	3.2	2.9	3.4	3.1
North Central	13.4	14.1	14.5	13.5	14.3	13.5	12.9	13.3	12.9	13.0
Northwest	9.2	9.1	8.6	9.6	8.4	8.6	8.6	8.0	7.8	8.4
South of Market	7.9	9.2	8.1	8.7	9.2	8.9	9.4	10.2	10.8	10.8
Southwest	34.9	34.4	33.4	33.4	33.8	34.2	32.6	31.5	31.0	30.3
Van Ness	3.9	4.3	5.4	4.6	4.4	4.8	4.9	5.2	5.2	5.4
Unclassified	0.5	0.3	0.5	0.4	1.0	0.8	1.0	1.0	1.1	1.5
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

C&I District	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
Bayview	-2.8	2.6	-11.3	-12.5	3.2	4.7	10.7	4.2	-1.6
Civic Center	-4.1	31.9	-11.2	-16.5	-5.5	10.0	1.5	33.9	8.9
Financial	-6.0	7.1	-9.7	-20.2	-3.3	15.2	15.0	6.5	-0.9
Mission	2.8	-3.3	-1.4	-9.7	6.3	-3.9	3.2	10.0	8.0
North Beach	-2.3	-4.6	3.9	-14.3	-9.0	12.5	-2.9	29.5	-5.0
North Central	6.7	5.2	-13.5	-8.7	-6.9	-2.2	10.5	8.4	5.2
Northwest	0.4	-2.6	2.5	-23.4	0.4	1.7	0.9	8.4	12.0
South of Market	18.8	-10.2	-0.3	-8.4	-5.0	8.2	16.4	17.4	4.9
Southwest	0.6	-0.9	-7.4	-12.4	-0.4	-2.4	3.9	9.4	2.0
Van Ness	11.5	28.3	-21.0	-16.8	7.8	4.1	13.2	11.3	9.9
Unclassified	-32.6	59.8	-34.5	154.9	-20.3	19.5	10.0	22.6	39.6
TOTAL	2.0	2.1	-7.5	-13.2	-1.7	2.4	7.5	11.1	4.3

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.2.1.B

TOTAL CONSTRUCTION COSTS FOR ALL BUILDING PERMITS BY COMMERCE & INDUSTRY DISTRICT, 2005–2014

This table presents the total cost of construction associated with building permits filed by Commerce & Industry District. For consistency with previous C&I reports, costs are adjusted for inflation, with 2013 being the base year. Also included is the percentage distribution in any given year and the annual change within each Commerce & Industry District.

Total Construction Costs (Inflation-Adjusted 2014 \$ 000s)

C&I District	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Bayview	\$387,916	\$86,806	\$152,816	\$24,423	\$146,586	\$45,893	\$35,354	\$74,691	\$144,853	\$270,568
Civic Center	\$93,327	\$180,618	\$118,968	\$89,985	\$60,392	\$160,016	\$88,520	\$679,857	\$347,581	\$311,688
Financial	\$1,108,154	\$731,820	\$682,612	\$496,096	\$274,405	\$550,418	\$479,572	\$1,125,345	\$1,259,999	\$1,045,562
Mission	\$131,604	\$100,260	\$124,850	\$59,786	\$53,386	\$70,637	\$75,857	\$72,389	\$159,407	\$168,579
North Beach	\$44,091	\$55,424	\$38,073	\$66,768	\$39,770	\$34,922	\$41,268	\$29,920	\$64,880	\$69,202
North Central	\$167,879	\$500,491	\$260,338	\$223,337	\$114,517	\$161,630	\$134,998	\$345,634	\$270,808	\$182,370
Northwest	\$110,884	\$113,070	\$165,336	\$114,584	\$61,765	\$76,790	\$66,497	\$87,993	\$95,671	\$113,712
South of Market	\$919,498	\$732,534	\$775,219	\$373,566	\$211,306	\$456,393	\$1,085,040	\$1,020,403	\$1,503,100	\$1,490,779
Southwest	\$410,622	\$346,648	\$352,773	\$312,485	\$293,183	\$295,612	\$227,929	\$319,270	\$434,644	\$400,773
Van Ness	\$117,588	\$130,348	\$197,380	\$66,992	\$52,374	\$49,276	\$204,307	\$139,472	\$214,762	\$98,044
Unclassified	\$29,828	\$74,728	\$5,602	\$3,823	\$11,254	\$513,539	\$1,202,624	\$668,947	\$1,059,585	\$673,253
TOTAL	\$3,521,391	\$3,052,747	\$2,873,967	\$1,831,845	\$1,318,938	\$2,415,126	\$3,641,966	\$4,563,921	\$5,555,290	\$4,824,530

Annual Percentage Distribution

C&I District	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Bayview	11.0	2.8	5.3	1.3	11.1	1.9	1.0	1.6	2.6	5.6
Civic Center	2.7	5.9	4.1	4.9	4.6	6.6	2.4	14.9	6.3	6.5
Financial	31.5	24.0	23.8	27.1	20.8	22.8	13.2	24.7	22.7	21.7
Mission	3.7	3.3	4.3	3.3	4.0	2.9	2.1	1.6	2.9	3.5
North Beach	1.3	1.8	1.3	3.6	3.0	1.4	1.1	0.7	1.2	1.4
North Central	4.8	16.4	9.1	12.2	8.7	6.7	3.7	7.6	4.9	3.8
Northwest	3.1	3.7	5.8	6.3	4.7	3.2	1.8	1.9	1.7	2.4
South of Market	26.1	24.0	27.0	20.4	16.0	18.9	29.8	22.4	27.1	30.9
Southwest	11.7	11.4	12.3	17.1	22.2	12.2	6.3	7.0	7.8	8.3
Van Ness	3.3	4.3	6.9	3.7	4.0	2.0	5.6	3.1	3.9	2.0
Unclassified	0.8	2.4	0.2	0.2	0.9	21.3	33.0	14.7	19.1	14.0
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

C&I District	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
Bayview	-77.6	76.0	-84.0	500.2	-68.7	-23.0	111.3	93.9	86.8
Civic Center	93.5	-34.1	-24.4	-32.9	165.0	-44.7	668.0	-48.9	-10.3
Financial	-34.0	-6.7	-27.3	-44.7	100.6	-12.9	134.7	12.0	-17.0
Mission	-23.8	24.5	-52.1	-10.7	32.3	7.4	-4.6	120.2	5.8
North Beach	25.7	-31.3	75.4	-40.4	-12.2	18.2	-27.5	116.8	6.7
North Central	198.1	-48.0	-14.2	-48.7	41.1	-16.5	156.0	-21.6	-32.7
Northwest	2.0	46.2	-30.7	-46.1	24.3	-13.4	32.3	8.7	18.9
South of Market	-20.3	5.8	-51.8	-43.4	116.0	137.7	-6.0	47.3	-0.8
Southwest	-15.6	1.8	-11.4	-6.2	0.8	-22.9	40.1	36.1	-7.8
Van Ness	10.9	51.4	-66.1	-21.8	-5.9	314.6	-31.7	54.0	-54.3
Unclassified	150.5	-92.5	-31.8	194.4	4,463.2	134.2	-44.4	58.4	-36.5
TOTAL	-13.3	-5.9	-36.3	-28.0	83.1	50.8	25.3	21.7	-13.2

1. Starting in 2010, there are a large number of permits for which locational information is not available.

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.2.1.C

AVERAGE CONSTRUCTION COSTS FOR ALL BUILDING PERMITS BY COMMERCE & INDUSTRY DISTRICT, 2005-2014

This table presents the average construction cost for all building permits filed by Commerce & Industry District. It represents the total costs (Table 6.2.1.B) divided by the total permits (Table 6.2.1.A).

Average Construction Costs (Inflation-Adjusted 2014 \$ 000s)

C&I District	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Bayview	\$541.8	\$124.7	\$214.0	\$38.6	\$264.6	\$80.2	\$59.0	\$112.7	\$209.6	\$397.9
Civic Center	\$116.7	\$235.5	\$117.6	\$100.1	\$80.4	\$225.4	\$113.3	\$857.3	\$327.3	\$269.4
Financial	\$298.9	\$209.9	\$182.9	\$147.2	\$102.1	\$211.7	\$160.2	\$326.9	\$343.5	\$287.6
Mission	\$65.4	\$48.5	\$62.5	\$30.3	\$30.0	\$37.3	\$41.7	\$38.5	\$77.1	\$75.5
North Beach	\$51.3	\$66.0	\$47.5	\$80.3	\$55.8	\$53.8	\$56.5	\$42.2	\$70.7	\$79.4
North Central	\$46.5	\$129.9	\$64.2	\$63.7	\$35.8	\$54.2	\$46.3	\$107.3	\$77.5	\$49.6
Northwest	\$44.9	\$45.6	\$68.4	\$46.2	\$32.6	\$40.3	\$34.3	\$45.1	\$45.2	\$47.9
South of Market	\$432.3	\$289.9	\$341.7	\$165.1	\$102.0	\$231.8	\$509.2	\$411.3	\$516.0	\$487.8
Southwest	\$43.8	\$36.8	\$37.7	\$36.1	\$38.7	\$39.2	\$30.9	\$41.7	\$51.9	\$46.9
Van Ness	\$112.0	\$111.3	\$131.4	\$56.5	\$53.1	\$46.3	\$184.4	\$111.2	\$153.8	\$63.9
Unclassified	\$231.2	\$858.9	\$40.3	\$42.0	\$48.5	\$2,775.9	\$5,441.7	\$2,752.9	\$3,555.7	\$1,618.4
Citywide Average	\$131.1	\$111.4	\$102.7	\$70.8	\$58.7	\$109.4	\$161.1	\$187.8	\$205.7	\$171.3

Percentage Change

C&I District	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
Bayview	-77.0	71.6	-82.0	585.8	-69.7	-26.4	90.9	86.1	89.8
Civic Center	101.9	-50.1	-14.9	-19.7	180.3	-49.7	656.4	-61.8	-17.7
Financial	-29.8	-12.9	-19.5	-30.7	107.4	-24.3	104.1	5.1	16.3
Mission	-25.9	28.8	-51.5	-1.1	24.4	11.7	-7.6	100.2	-2.1
North Beach	28.7	-28.0	68.8	-30.5	-3.5	5.1	-25.4	67.5	12.3
North Central	179.5	-50.6	-0.8	-43.9	51.6	-14.6	131.8	-27.8	-36.0
Northwest	1.5	50.2	-32.4	-29.6	23.9	-14.8	31.2	0.3	6.1
South of Market	-32.9	17.9	-51.7	-38.2	127.3	119.7	-19.2	25.5	-5.5
Southwest	-16.1	2.6	-4.3	7.1	1.3	-21.0	34.8	24.4	-9.6
Van Ness	-0.6	18.1	-57.0	-6.1	-12.7	298.2	-39.7	38.3	-58.5
Unclassified	271.5	-95.3	4.2	15.5	5,622.5	96.0	-49.4	29.2	-54.5
Citywide Average	-15.0	-7.8	-31.1	-17.0	86.3	47.3	16.6	9.5	16.8

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.2.2.A

BUILDING PERMITS FOR NEW CONSTRUCTION BY COMMERCE & INDUSTRY DISTRICT, 2005-2014

This table presents the number of building permits filed for new construction by Commerce & Industry District. Also included is the percentage distribution in any given year and the annual change within each Commerce & Industry District.

Number of Permits

C&I District	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Bayview	50	27	15	16	15	9	3	13	20	18
Civic Center	4	4	2	4	3	9	3	6	11	3
Financial	8	6	6	3	1	3	4	10	9	7
Mission	28	27	30	8	4	4	4	8	15	29
North Beach	2	1	0	1	0	0	1	1	2	1
North Central	42	23	18	14	2	11	7	17	15	12
Northwest	10	16	12	7	3	7	3	5	10	14
South of Market	39	32	23	20	9	8	19	21	34	45
Southwest	86	73	67	55	39	62	19	77	53	81
Van Ness	10	11	11	2	4	3	3	6	2	6
Unclassified	5	10	5	2	1	23	27	34	30	44
TOTAL	284	230	189	132	81	139	93	198	201	260

Annual Percentage Distribution

C&I District	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Bayview	17.6	11.7	7.9	12.1	18.5	6.5	3.2	6.6	10.0	6.9
Civic Center	1.4	1.7	1.1	3.0	3.7	6.5	3.2	3.0	5.5	1.2
Financial	2.8	2.6	3.2	2.3	1.2	2.2	4.3	5.1	4.5	2.7
Mission	9.9	11.7	15.9	6.1	4.9	2.9	4.3	4.0	7.5	11.2
North Beach	0.7	0.4	0.0	0.8	0.0	0.0	1.1	0.5	1.0	0.4
North Central	14.8	10.0	9.5	10.6	2.5	7.9	7.5	8.6	7.5	4.6
Northwest	3.5	7.0	6.3	5.3	3.7	5.0	3.2	2.5	5.0	5.4
South of Market	13.7	13.9	12.2	15.2	11.1	5.8	20.4	10.6	16.9	17.3
Southwest	30.3	31.7	35.4	41.7	48.1	44.6	20.4	38.9	26.4	31.2
Van Ness	3.5	4.8	5.8	1.5	4.9	2.2	3.2	3.0	1.0	2.3
Unclassified	1.8	4.3	2.6	1.5	1.2	16.5	29.0	17.2	14.9	16.9
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

C&I District	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
Bayview	-46.0	-44.4	6.7	-6.3	-40.0	-66.7	333.3	53.8	-10.0
Civic Center	0.0	-50.0	100.0	-25.0	200.0	-66.7	100.0	83.3	-72.7
Financial	-25.0	0.0	-50.0	-66.7	200.0	33.3	150.0	-10.0	-22.2
Mission	-3.6	11.1	-73.3	-50.0	0.0	0.0	100.0	87.5	93.3
North Beach	-50.0	-100.0	--	-100.0	--	--	0.0	100.0	-50.0
North Central	-45.2	-21.7	-22.2	-85.7	450.0	-36.4	142.9	-11.8	-20.0
Northwest	60.0	-25.0	-41.7	-57.1	133.3	-57.1	66.7	100.0	40.0
South of Market	-17.9	-28.1	-13.0	-55.0	-11.1	137.5	10.5	61.9	32.4
Southwest	-15.1	-8.2	-17.9	-29.1	59.0	-69.4	305.3	-31.2	52.8
Van Ness	10.0	0.0	-81.8	100.0	-25.0	0.0	100.0	-66.7	200.0
Unclassified	100.0	-50.0	-60.0	-50.0	2,200.0	17.4	25.9	-11.8	46.7
TOTAL	-19.0	-17.8	-30.2	-38.6	71.6	-33.1	112.9	1.5	29.4

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.2.2.B TOTAL CONSTRUCTION COSTS FOR NEW CONSTRUCTION BY COMMERCE & INDUSTRY DISTRICT, 2005–2014

This table presents the total cost of new construction associated with building permits filed by Commerce & Industry District. For consistency with previous C&I reports, costs are adjusted for inflation, with 2014 being the base year. Also included is the percentage distribution in any given year and the annual change within each Commerce & Industry District.

Total Construction Costs (Inflation-Adjusted 2014 \$ 000s)

C&I District	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Bayview	\$358,730	\$21,388	\$75,297	\$5,588	\$112,780	\$23,427	\$815	\$51,775	\$114,123	\$200,185
Civic Center	\$41,511	\$110,202	\$2,640	\$12,295	\$12,073	\$97,156	\$27,196	\$81,876	\$218,277	\$201,900
Financial	\$636,639	\$320,013	\$254,749	\$26,666	\$19,678	\$201,309	\$157,608	\$703,553	\$684,222	\$598,755
Mission	\$65,881	\$49,797	\$38,648	\$4,304	\$3,777	\$6,528	\$4,888	\$6,024	\$55,292	\$72,409
North Beach	\$3,735	\$1,143	\$0	\$28,407	\$0	\$0	\$7,568	\$390	\$10,232	\$650
North Central	\$17,053	\$310,504	\$58,888	\$85,490	\$2,294	\$43,358	\$22,808	\$180,268	\$21,144	\$22,605
Northwest	\$18,653	\$12,495	\$78,900	\$25,964	\$2,571	\$4,625	\$3,507	\$4,557	\$7,822	\$11,214
South of Market	\$727,462	\$462,346	\$315,227	\$197,483	\$9,063	\$253,070	\$752,530	\$573,311	\$826,429	\$803,789
Southwest	\$89,637	\$70,035	\$63,210	\$75,245	\$103,357	\$96,280	\$14,153	\$80,938	\$102,749	\$79,004
Van Ness	\$67,249	\$45,661	\$98,966	\$6,219	\$15,784	\$5,694	\$154,890	\$56,094	\$40,807	\$21,769
Unclassified	\$26,928	\$44,167	\$2,990	\$1,769	\$5,790	\$391,429	\$1,065,847	\$597,048	\$726,473	\$634,008
TOTAL	\$2,053,478	\$1,447,751	\$989,515	\$469,430	\$287,167	\$1,122,876	\$2,211,810	\$2,335,830	\$2,807,570	\$2,645,492

Annual Percentage Distribution

C&I District	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Bayview	17.5	1.5	7.6	1.2	39.3	2.1	0.0	2.2	4.1	7.6
Civic Center	2.0	7.6	0.3	2.6	4.2	8.7	1.2	3.5	7.8	7.8
Financial	31.0	22.1	25.7	5.7	6.9	17.9	7.1	30.1	24.4	22.8
Mission	3.2	3.4	3.9	0.9	1.3	0.6	0.2	0.3	2.0	2.7
North Beach	0.2	0.1	0.0	6.1	0.0	0.0	0.3	0.0	0.4	0.0
North Central	0.8	21.4	6.0	18.2	0.8	3.9	1.0	7.7	0.8	0.9
Northwest	0.9	0.9	8.0	5.5	0.9	0.4	0.2	0.2	0.3	0.4
South of Market	35.4	31.9	31.9	42.1	3.2	22.5	34.0	24.5	29.4	30.4
Southwest	4.4	4.8	6.4	16.0	36.0	8.6	0.6	3.5	3.7	3.0
Van Ness	3.3	3.2	10.0	1.3	5.5	0.5	7.0	2.4	1.5	0.8
Unclassified	1.3	3.1	0.3	0.4	2.0	34.9	48.2	25.6	25.9	24.0
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

C&I District	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
Bayview	-94.0	252.1	-92.6	1,918.3	-79.2	-96.5	6,252.8	120.4	75.3
Civic Center	165.5	-97.6	365.7	-1.8	704.7	-72.0	201.1	166.8	7.5
Financial	-49.7	-20.4	-89.5	-26.2	923.0	-21.7	346.4	-2.7	-12.4
Mission	-24.4	-22.4	-88.9	-12.2	72.8	-25.1	23.2	817.9	31.2
North Beach	-69.4	-100.0	--	-100.0	--	--	-94.8	2,523.6	-93.6
North Central	1,720.8	-81.0	45.2	-97.3	1,790.1	-47.4	690.4	-88.3	6.9
Northwest	-33.0	531.5	-67.1	-90.1	79.9	-24.2	29.9	71.6	43.4
South of Market	-36.4	-31.8	-37.4	-95.4	2,692.3	197.4	-23.8	44.2	-2.7
Southwest	-21.9	-9.7	19.0	37.4	-6.8	-85.3	471.9	27.0	-23.1
Van Ness	-32.1	116.7	-93.7	153.8	-63.9	2,820.2	-63.8	-27.3	48.4
Unclassified	64.0	-93.2	-40.8	227.3	6,660.4	172.3	-44.0	21.7	-12.7
TOTAL	-29.5	-31.7	-52.6	-38.8	291.0	97.0	5.8	20.2	4.8

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.2.2.C

AVERAGE CONSTRUCTION COSTS FOR NEW CONSTRUCTION BY COMMERCE & INDUSTRY DISTRICT, 2005–2014

This table presents the average cost of new construction for all building permits filed by Commerce & Industry District. It represents the total costs (Table 6.2.2.B) divided by the total permits (Table 6.2.2.A).

Average Construction Costs (Inflation-Adjusted 2014 \$ 000s)

C&I District	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Bayview	\$7,175	\$792	\$5,020	\$349	\$7,519	\$2,603	\$272	\$3,983	\$5,706	\$11,117
Civic Center	\$10,378	\$27,551	\$1,320	\$3,074	\$4,024	\$10,795	\$9,065	\$13,646	\$19,843	\$67,300
Financial	\$79,580	\$53,336	\$42,458	\$8,889	\$19,678	\$67,103	\$39,402	\$70,355	\$76,025	\$85,536
Mission	\$2,353	\$1,844	\$1,288	\$538	\$944	\$1,632	\$1,222	\$753	\$3,686	\$2,497
North Beach	\$1,868	\$1,143	#DIV/0!	--	#DIV/0!	--	--	\$390	\$5,116	\$650
North Central	\$406	\$13,500	\$3,272	\$6,106	\$1,147	\$3,942	\$3,258	\$10,604	\$1,410	\$1,884
Northwest	\$1,865	\$781	\$6,575	\$3,709	\$857	\$661	\$1,169	\$911	\$782	\$801
South of Market	\$18,653	\$14,448	\$13,706	\$9,874	\$1,007	\$31,634	\$39,607	\$27,301	\$24,307	\$17,861
Southwest	\$1,042	\$959	\$943	\$1,368	\$2,650	\$1,553	\$745	\$1,051	\$1,939	\$975
Van Ness	\$6,725	\$4,151	\$8,997	\$3,110	\$3,946	\$1,898	\$51,630	\$9,349	\$20,404	\$3,510
Unclassified	\$5,386	\$4,417	\$598	\$885	\$5,790	\$17,019	\$39,476	\$17,560	\$24,216	\$14,410
Citywide Average	\$7,231	\$6,295	\$5,236	\$3,556	\$3,545	\$8,078	\$23,783	\$11,797	\$13,968	\$10,175

Percentage Change

C&I District	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
Bayview	-89.0	533.7	-93.0	2,052.8	-65.4	-89.6	1,366.0	43.3	94.8
Civic Center	165.5	-95.2	132.9	30.9	168.2	-16.0	50.5	45.4	239.2
Financial	-33.0	-20.4	-79.1	121.4	241.0	-41.3	78.6	8.1	12.5
Mission	-21.6	-30.2	-58.2	75.5	72.8	-25.1	-38.4	389.5	-32.3
North Beach	-38.8	--	--	--	--	--	--	1,211.8	-87.3
North Central	3,225.0	-75.8	86.7	-81.2	243.6	-17.3	225.4	-86.7	33.6
Northwest	-58.1	741.9	-43.6	-76.9	-22.9	76.9	-22.0	-14.2	2.4
South of Market	-22.5	-5.1	-28.0	-89.8	3,041.4	25.2	-31.1	-11.0	-26.5
Southwest	-8.0	-1.7	45.0	93.7	-41.4	-52.0	41.1	84.4	-49.7
Van Ness	-38.3	116.7	-65.4	26.9	-51.9	2,620.2	-81.9	118.2	-82.8
Unclassified	-18.0	-86.5	47.9	554.6	193.9	132.0	-55.5	37.9	-40.5
Citywide Average	-12.9	-16.8	-32.1	-0.3	127.9	194.4	-50.4	18.4	-27.2

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.2.3.A

BUILDING PERMITS FOR ALTERATIONS AND DEMOLITIONS BY COMMERCE & INDUSTRY DISTRICT, 2005–2014

This table presents the number of building permits filed for alterations and demolitions by Commerce & Industry District. Also included is the percentage distribution in any given year and the annual change within each Commerce & Industry District.

Number of Permits

C&I District	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Bayview	654	648	690	601	524	544	572	635	646	647
Civic Center	763	736	969	843	723	674	734	736	1,003	1,100
Financial	3,612	3,419	3,629	3,238	2,608	2,508	2,882	3,213	3,548	3,481
Mission	1,963	2,023	1,941	1,939	1,753	1,864	1,785	1,839	2,019	2,178
North Beach	849	823	787	805	689	626	705	673	836	822
North Central	3,519	3,789	3,967	3,433	3,165	2,943	2,870	3,116	3,401	3,614
Northwest	2,447	2,435	2,352	2,440	1,874	1,877	1,916	1,904	2,045	2,326
South of Market	2,011	2,381	2,110	2,152	2,004	1,841	2,019	2,298	2,722	2,859
Southwest	9,214	9,283	9,173	8,519	7,476	7,431	7,282	7,435	8,216	8,335
Van Ness	1,024	1,149	1,460	1,148	956	1,048	1,085	1,208	1,356	1,495
Unclassified	114	68	125	88	227	156	187	191	253	335
TOTAL	26,170	26,754	27,203	25,206	21,999	21,512	22,037	23,248	26,045	27,192

Annual Percentage Distribution

C&I District	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Bayview	2.5	2.4	2.5	2.4	2.4	2.5	2.6	2.7	2.5	2.4
Civic Center	2.9	2.8	3.6	3.3	3.3	3.1	3.3	3.2	3.9	4.0
Financial	13.8	12.8	13.3	12.8	11.9	11.7	13.1	13.8	13.6	12.8
Mission	7.5	7.6	7.1	7.7	8.0	8.7	8.1	7.9	7.8	8.0
North Beach	3.2	3.1	2.9	3.2	3.1	2.9	3.2	2.9	3.2	3.0
North Central	13.4	14.2	14.6	13.6	14.4	13.7	13.0	13.4	13.1	13.3
Northwest	9.4	9.1	8.6	9.7	8.5	8.7	8.7	8.2	7.9	8.6
South of Market	7.7	8.9	7.8	8.5	9.1	8.6	9.2	9.9	10.5	10.5
Southwest	35.2	34.7	33.7	33.8	34.0	34.5	33.0	32.0	31.5	30.7
Van Ness	3.9	4.3	5.4	4.6	4.3	4.9	4.9	5.2	5.2	5.5
Unclassified	0.4	0.3	0.5	0.3	1.0	0.7	0.8	0.8	1.0	1.2
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

C&I District	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
Bayview	-0.9	6.5	-12.9	-12.8	3.8	5.1	11.0	1.7	0.2
Civic Center	-3.5	31.7	-13.0	-14.2	-6.8	8.9	0.3	36.3	9.7
Financial	-5.3	6.1	-10.8	-19.5	-3.8	14.9	11.5	10.4	-1.9
Mission	3.1	-4.1	-0.1	-9.6	6.3	-4.2	3.0	9.8	7.6
North Beach	-3.1	-4.4	2.3	-14.4	-9.1	12.6	-4.5	24.2	1.8
North Central	7.7	4.7	-13.5	-7.8	-7.0	-2.5	8.6	9.1	6.3
Northwest	-0.5	-3.4	3.7	-23.2	0.2	2.1	-0.6	17.4	13.7
South of Market	18.4	-11.4	2.0	-6.9	-8.1	9.7	13.8	18.5	5.8
Southwest	0.7	-1.2	-7.1	-12.2	-0.6	-2.0	2.1	10.5	1.4
Van Ness	12.2	27.1	-21.4	-16.7	9.6	3.5	11.3	12.3	10.3
Unclassified	-40.4	83.8	-29.6	158.0	-31.3	19.9	2.1	32.5	-32.4
TOTAL	2.2	1.7	-7.3	-12.7	-2.2	2.4	5.5	12.0	4.4

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.2.3.B

TOTAL CONSTRUCTION COSTS FOR ALTERATIONS AND DEMOLITIONS BY COMMERCE & INDUSTRY DISTRICT, 2005–2014

This table presents the total cost of construction associated with building permits filed for alterations and demolitions by Commerce & Industry District. For ease of comprehension, costs are adjusted for inflation, with 2014 being the base year. Also included is the percentage distribution in any given year and the annual change within each Commerce & Industry District.

Total Construction Costs (Inflation-Adjusted 2014 \$ 000s)

C&I District	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Bayview	\$28,576	\$32,875	\$77,365	\$18,653	\$33,305	\$19,540	\$34,371	\$21,622	\$29,085	\$69,706
Civic Center	\$51,574	\$70,227	\$115,855	\$77,399	\$48,177	\$62,712	\$61,012	\$377,621	\$129,111	\$109,550
Financial	\$470,829	\$409,668	\$416,678	\$467,243	\$253,901	\$348,637	\$321,525	\$420,369	\$567,293	\$446,225
Mission	\$65,318	\$50,302	\$86,091	\$55,399	\$49,455	\$64,035	\$70,825	\$66,098	\$103,202	\$96,121
North Beach	\$40,326	\$54,172	\$37,711	\$38,183	\$39,686	\$34,811	\$33,529	\$29,424	\$52,420	\$68,340
North Central	\$150,548	\$189,796	\$201,136	\$136,712	\$111,993	\$118,164	\$112,072	\$164,270	\$248,886	\$159,518
Northwest	\$92,179	\$100,338	\$86,102	\$88,516	\$59,106	\$72,068	\$62,946	\$83,342	\$87,337	\$102,407
South of Market	\$188,891	\$268,224	\$452,653	\$174,144	\$201,916	\$202,036	\$328,284	\$444,454	\$663,038	\$686,341
Southwest	\$319,279	\$275,675	\$288,425	\$236,771	\$187,914	\$198,767	\$213,514	\$220,566	\$329,332	\$306,620
Van Ness	\$50,271	\$83,615	\$95,030	\$60,588	\$36,448	\$43,557	\$49,367	\$82,628	\$172,990	\$75,163
Unclassified	\$2,822	\$30,433	\$2,572	\$2,054	\$5,452	\$122,037	\$136,769	\$59,334	\$323,947	\$35,077
TOTAL	\$1,460,613	\$1,565,325	\$1,859,618	\$1,355,662	\$1,027,353	\$1,286,364	\$1,424,214	\$1,969,728	\$2,706,641	\$2,155,068

Annual Percentage Distribution

C&I District	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Bayview	2.0	2.1	4.2	1.4	3.2	1.5	2.4	1.1	1.1	3.2
Civic Center	3.5	4.5	6.2	5.7	4.7	4.9	4.3	19.2	4.8	5.1
Financial	32.2	26.2	22.4	34.5	24.7	27.1	22.6	21.3	21.0	20.7
Mission	4.5	3.2	4.6	4.1	4.8	5.0	5.0	3.4	3.8	4.5
North Beach	2.8	3.5	2.0	2.8	3.9	2.7	2.4	1.5	1.9	3.2
North Central	10.3	12.1	10.8	10.1	10.9	9.2	7.9	8.3	9.2	7.4
Northwest	6.3	6.4	4.6	6.5	5.8	5.6	4.4	4.2	3.2	4.8
South of Market	12.9	17.1	24.3	12.8	19.7	15.7	23.1	22.6	24.5	31.8
Southwest	21.9	17.6	15.5	17.5	18.3	15.5	15.0	11.2	12.2	14.2
Van Ness	3.4	5.3	5.1	4.5	3.5	3.4	3.5	4.2	6.4	3.5
Unclassified	0.2	1.9	0.1	0.2	0.5	9.5	9.6	3.0	12.0	1.6
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

C&I District	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
Bayview	15.0	135.3	-75.9	78.6	-41.3	75.9	-37.1	34.5	139.7
Civic Center	36.2	65.0	-33.2	-37.8	30.2	-2.7	518.9	-65.8	-15.2
Financial	-13.0	1.7	12.1	-45.7	37.3	-7.8	30.7	35.0	-21.3
Mission	-23.0	71.1	-35.7	-10.7	29.5	10.6	-6.7	56.1	-6.9
North Beach	34.3	-30.4	1.3	3.9	-12.3	-3.7	-12.2	78.2	30.4
North Central	26.1	6.0	-32.0	-18.1	5.5	-5.2	46.6	51.5	-35.9
Northwest	8.9	-14.2	2.8	-33.2	21.9	-12.7	32.4	4.8	17.3
South of Market	42.0	68.8	-61.5	15.9	0.1	62.5	35.4	49.2	3.5
Southwest	-13.7	4.6	-17.9	-20.6	5.8	7.4	3.3	48.3	-6.9
Van Ness	66.3	13.7	-36.2	-39.8	19.5	13.3	67.4	109.4	-56.6
Unclassified	978.4	-91.5	-20.1	165.4	2138.4	12.1	-56.6	446.0	-89.2
TOTAL	7.2	18.8	-27.1	-24.2	25.2	10.7	38.3	37.4	-20.4

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.2.3.C

AVERAGE CONSTRUCTION COSTS FOR ALTERATIONS AND DEMOLITIONS BY COMMERCE & INDUSTRY DISTRICT, 2005-2014

This table presents the average construction cost for all building permits filed for alterations and demolitions by Commerce & Industry District. It represents the total costs (Table 6.2.3.B) divided by the total permits (Table 6.2.3.A).

Average Construction Costs (Inflation-Adjusted 2014 \$ 000s)

C&I District	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Bayview	\$43.7	\$50.7	\$112.1	\$31.0	\$63.6	\$35.9	\$60.1	\$34.1	\$45.0	\$107.7
Civic Center	\$67.6	\$95.4	\$119.6	\$91.8	\$66.6	\$93.0	\$83.1	\$513.1	\$128.7	\$99.6
Financial	\$130.4	\$119.8	\$114.8	\$144.3	\$97.4	\$139.0	\$111.6	\$130.8	\$159.9	\$128.2
Mission	\$33.3	\$24.9	\$44.4	\$28.6	\$28.2	\$34.4	\$39.7	\$35.9	\$51.1	\$44.1
North Beach	\$47.5	\$65.8	\$47.9	\$47.4	\$57.6	\$55.6	\$47.6	\$43.7	\$62.7	\$83.1
North Central	\$42.8	\$50.1	\$50.7	\$39.8	\$35.4	\$40.2	\$39.0	\$52.7	\$73.2	\$44.1
Northwest	\$37.7	\$41.2	\$36.6	\$36.3	\$31.5	\$38.4	\$32.9	\$43.8	\$42.7	\$44.0
South of Market	\$93.9	\$112.7	\$214.5	\$80.9	\$100.8	\$109.7	\$162.6	\$193.4	\$243.6	\$240.1
Southwest	\$34.7	\$29.7	\$31.4	\$27.8	\$25.1	\$26.7	\$29.3	\$29.7	\$40.1	\$36.8
Van Ness	\$49.1	\$72.8	\$65.1	\$52.8	\$38.1	\$41.6	\$45.5	\$68.4	\$127.6	\$50.3
Unclassified	\$24.8	\$447.5	\$20.6	\$23.3	\$24.0	\$782.3	\$731.4	\$310.6	\$1,280.4	\$104.7
Citywide Average	\$55.8	\$58.5	\$68.4	\$53.8	\$46.7	\$59.8	\$64.6	\$84.7	\$103.9	\$79.3

Percentage Change

C&I District	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
Bayview	16.1	121.0	-72.3	104.8	-43.5	67.3	-43.3	32.2	139.3
Civic Center	41.2	25.3	-23.2	-27.4	39.6	-10.7	517.2	-74.9	-22.6
Financial	-8.1	-4.2	25.7	-32.5	42.8	-19.7	17.3	22.2	-19.8
Mission	-25.3	78.4	-35.6	-1.3	21.8	15.5	-9.4	42.2	13.7
North Beach	38.6	-27.2	-1.0	21.4	-3.5	-14.5	-8.1	43.4	32.6
North Central	17.1	1.2	-21.5	-11.1	13.5	-2.7	35.0	38.8	39.7
Northwest	9.4	-11.2	-0.9	-13.1	21.7	-14.4	33.2	-2.4	3.1
South of Market	19.9	90.4	-62.3	24.5	8.9	48.2	18.9	25.9	-1.4
Southwest	-14.3	5.9	-11.6	-9.6	6.4	9.6	1.2	35.1	-8.2
Van Ness	48.2	-10.6	-18.9	-27.8	9.0	9.5	50.3	86.5	-60.6
Unclassified	1707.9	-95.4	13.4	2.9	3157.1	-6.5	57.5	312.2	-91.8
Citywide Average	4.8	16.8	-21.3	-13.2	28.0	8.1	31.1	22.7	23.7

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.3.A

PERMIT APPLICATIONS BY COMMERCE & INDUSTRY DISTRICT AND LAND USE CATEGORY, 2014

This table presents the permit applications by both Commerce & Industry District and Land Use Category. Also included is the percentage distribution in any given by both land use category and Commerce & Industry District.

Number of Permits

<i>C&I District</i>	<i>Office</i>	<i>Retail</i>	<i>PDR</i>	<i>Hotel</i>	<i>CIE</i>	<i>Residential</i>	<i>Other</i>	<i>TOTAL</i>
Bayview	48	60	101	0	12	418	41	680
Civic Center	332	163	3	63	60	468	68	1,157
Financial	2,555	385	19	62	77	358	179	3,635
Mission	117	154	33	14	73	1,782	60	2,233
North Beach	60	119	2	32	42	554	63	872
North Central	47	212	4	19	100	3,200	93	3,675
Northwest	32	112	6	0	53	2,108	61	2,372
South of Market	1,057	464	116	54	114	1,039	212	3,056
Southwest	124	361	18	4	129	7,675	230	8,541
Van Ness	78	169	4	34	34	1,153	62	1,534
Unclassified	15	10	0	3	8	145	235	416
TOTAL	4,465	2,209	306	285	702	18,900	1,304	28,171

Percentage Distribution by C&I District

<i>C&I District</i>	<i>Office</i>	<i>Retail</i>	<i>PDR</i>	<i>Hotel</i>	<i>CIE</i>	<i>Residential</i>	<i>Other</i>	<i>TOTAL</i>
Bayview	1.1	2.7	33.0	0.0	1.7	2.2	3.1	2.4
Civic Center	7.4	7.4	1.0	22.1	8.5	2.5	5.2	4.1
Financial	57.2	17.4	6.2	21.8	11.0	1.9	13.7	12.9
Mission	2.6	7.0	10.8	4.9	10.4	9.4	4.6	7.9
North Beach	1.3	5.4	0.7	11.2	6.0	2.9	4.8	3.1
North Central	1.1	9.6	1.3	6.7	14.2	16.9	7.1	13.0
Northwest	0.7	5.1	2.0	0.0	7.5	11.2	4.7	8.4
South of Market	23.7	21.0	37.9	18.9	16.2	5.5	16.3	10.8
Southwest	2.8	16.3	5.9	1.4	18.4	40.6	17.6	30.3
Van Ness	1.7	7.7	1.3	11.9	4.8	6.1	4.8	5.4
Unclassified	0.3	0.5	0.0	1.1	1.1	0.8	18.0	1.5
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Land Use Category

<i>C&I District</i>	<i>Office</i>	<i>Retail</i>	<i>PDR</i>	<i>Hotel</i>	<i>CIE</i>	<i>Residential</i>	<i>Other</i>	<i>TOTAL</i>
Bayview	7.1	8.8	14.9	0.0	1.8	61.5	6.0	100.0
Civic Center	28.7	14.1	0.3	5.4	5.2	40.4	5.9	100.0
Financial	70.3	10.6	0.5	1.7	2.1	9.8	4.9	100.0
Mission	5.2	6.9	1.5	0.6	3.3	79.8	2.7	100.0
North Beach	6.9	13.6	0.2	3.7	4.8	63.5	7.2	100.0
North Central	1.3	5.8	0.1	0.5	2.7	87.1	2.5	100.0
Northwest	1.3	4.7	0.3	0.0	2.2	88.9	2.6	100.0
South of Market	34.6	15.2	3.8	1.8	3.7	34.0	6.9	100.0
Southwest	1.5	4.2	0.2	0.0	1.5	89.9	2.7	100.0
Van Ness	5.1	11.0	0.3	2.2	2.2	75.2	4.0	100.0
Unclassified	3.6	2.4	0.0	0.7	1.9	34.9	56.5	100.0
TOTAL	15.8	7.8	1.1	1.0	2.5	67.1	4.6	100.0

Notes: PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational
Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.3.B

TOTAL CONSTRUCTION COSTS BY COMMERCE & INDUSTRY DISTRICT AND LAND USE CATEGORY, 2014

This table presents the total construction cost for all permit applications by both Commerce & Industry District and Land Use Category. Also included is the percentage distribution in any given by both land use category and Commerce & Industry District.

Total Construction Costs (2014 \$ 000s)

C&I District	Office	Retail	PDR	Hotel	CIE	Residential	Other	TOTAL
Bayview	\$141,103	\$2,286	\$7,063	\$0	\$3,587	\$115,247	\$1,282	\$270,568
Civic Center	\$47,779	\$9,660	\$22	\$14,584	\$9,507	\$227,147	\$2,990	\$311,688
Financial	\$381,267	\$26,041	\$8,789	\$8,806	\$11,180	\$605,159	\$4,321	\$1,045,562
Mission	\$11,067	\$4,254	\$2,015	\$127	\$4,132	\$143,269	\$3,716	\$168,579
North Beach	\$4,720	\$7,964	\$10	\$12,050	\$6,757	\$33,291	\$4,409	\$69,202
North Central	\$1,765	\$7,846	\$694	\$466	\$13,485	\$156,847	\$1,268	\$182,370
Northwest	\$1,382	\$5,554	\$218	\$0	\$6,666	\$98,706	\$1,185	\$113,712
South of Market	\$521,463	\$50,731	\$19,720	\$17,479	\$289,010	\$586,490	\$5,886	\$1,490,779
Southwest	\$15,320	\$18,680	\$6,716	\$60	\$19,460	\$316,194	\$24,343	\$400,773
Van Ness	\$6,843	\$7,875	\$233	\$2,228	\$5,180	\$58,200	\$17,486	\$98,044
Unclassified	\$17,594	\$1,089	\$0	\$42,000	\$1,774	\$593,449	\$17,347	\$673,253
TOTAL	\$1,150,302	\$141,979	\$45,479	\$97,799	\$370,738	\$2,933,999	\$84,233	\$4,824,529

Annual Percentage Distribution by C&I District

C&I District	Office	Retail	PDR	Hotel	CIE	Residential	Other	TOTAL
Bayview	12.3	1.6	15.5	0.0	1.0	3.9	1.5	5.6
Civic Center	4.2	6.8	0.0	14.9	2.6	7.7	3.5	6.5
Financial	33.1	18.3	19.3	9.0	3.0	20.6	5.1	21.7
Mission	1.0	3.0	4.4	0.1	1.1	4.9	4.4	3.5
North Beach	0.4	5.6	0.0	12.3	1.8	1.1	5.2	1.4
North Central	0.2	5.5	1.5	0.5	3.6	5.3	1.5	3.8
Northwest	0.1	3.9	0.5	0.0	1.8	3.4	1.4	2.4
South of Market	45.3	35.7	43.4	17.9	78.0	20.0	7.0	30.9
Southwest	1.3	13.2	14.8	0.1	5.2	10.8	28.9	8.3
Van Ness	0.6	5.5	0.5	2.3	1.4	2.0	20.8	2.0
Unclassified	1.5	0.8	0.0	42.9	0.5	20.2	20.6	14.0
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Annual Percentage Distribution by Land Use Category

C&I District	Office	Retail	PDR	Hotel	CIE	Residential	Other	TOTAL
Bayview	52.2	0.8	2.6	0.0	1.3	42.6	0.5	100.0
Civic Center	15.3	3.1	0.0	4.7	3.1	72.9	1.0	100.0
Financial	36.5	2.5	0.8	0.8	1.1	57.9	0.4	100.0
Mission	6.6	2.5	1.2	0.1	2.5	85.0	2.2	100.0
North Beach	6.8	11.5	0.0	17.4	9.8	48.1	6.4	100.0
North Central	1.0	4.3	0.4	0.3	7.4	86.0	0.7	100.0
Northwest	1.2	4.9	0.2	0.0	5.9	86.8	1.0	100.0
South of Market	35.0	3.4	1.3	1.2	19.4	39.3	0.4	100.0
Southwest	3.8	4.7	1.7	0.0	4.9	78.9	6.1	100.0
Van Ness	7.0	8.0	0.2	2.3	5.3	59.4	17.8	100.0
Unclassified	2.6	0.2	0.0	6.2	0.3	88.1	2.6	100.0
TOTAL	23.8	2.9	0.9	2.0	7.7	60.8	1.7	100.0

Notes: PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.3.C

AVERAGE CONSTRUCTION COSTS FOR ALL PERMITS BY COMMERCE & INDUSTRY DISTRICT AND LAND USE CATEGORY, 2014

This table presents the average construction cost for all permit applications by both Commerce & Industry District and Land Use Category. It represents the total costs (Table 6.3.B) divided by the total permits (Table 6.3.A).

Average Construction Costs (2014 \$ 000s)

Commerce & Industry District	Office	Retail	PDR	Hotel	CIE	Residential	Other	Average
Bayview	\$2,939.6	\$38.1	\$69.9	#DIV/0!	\$298.9	\$275.7	\$31.3	\$397.5
Civic Center	\$143.9	\$59.3	\$7.2	\$231.5	\$158.5	\$485.4	\$44.0	\$269.4
Financial	\$149.2	\$67.6	\$462.6	\$142.0	\$145.2	\$1,690.4	\$24.1	\$287.6
Mission	\$94.6	\$27.6	\$61.1	\$9.0	\$56.6	\$80.4	\$61.9	\$75.5
North Beach	\$78.7	\$66.9	\$4.8	\$376.6	\$160.9	\$60.1	\$70.0	\$79.9
North Central	\$37.5	\$37.0	\$173.6	\$24.5	\$134.9	\$49.0	\$13.6	\$49.9
Northwest	\$43.2	\$49.6	\$36.3	#DIV/0!	\$125.8	\$46.8	\$19.4	\$47.9
South of Market	\$493.3	\$109.3	\$170.0	\$323.7	\$2,535.2	\$564.5	\$27.8	\$487.6
Southwest	\$123.6	\$51.7	\$373.1	\$15.1	\$150.9	\$41.2	\$105.8	\$46.9
Van Ness	\$87.7	\$46.6	\$58.3	\$65.5	\$152.4	\$50.5	\$282.0	\$63.9
Unclassified	\$1,172.9	\$108.9	#DIV/0!	\$14,000.0	\$221.7	\$4,092.8	\$73.8	\$1,618.4
Citywide Average	\$257.6	\$64.3	\$148.6	\$343.2	\$528.1	\$155.2	\$64.6	\$171.3

Notes: PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.4.1.A

ALL BUILDING PERMITS BY LAND USE CATEGORY AND PERMIT STATUS, 2014

This table presents the status of building permits by Land Use Category. Also included is the percentage distribution by Land Use Category and by permit status.

Number of Permits

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	799	26	3,061	340	239	4,465
Retail	409	14	1,288	273	225	2,209
PDR	66	2	165	42	31	306
Hotel	68	2	143	44	28	285
CIE	136	8	401	88	69	702
Residential	3,120	153	11,764	2,540	1,323	18,900
Other	264	6	303	132	599	1,304
TOTAL	4,862	211	17,125	3,459	2,514	28,171

Percentage Distribution by Land Use Category

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	16.4	12.3	17.9	9.8	9.5	15.8
Retail	8.4	6.6	7.5	7.9	8.9	7.8
PDR	1.4	0.9	1.0	1.2	1.2	1.1
Hotel	1.4	0.9	0.8	1.3	1.1	1.0
CIE	2.8	3.8	2.3	2.5	2.7	2.5
Residential	64.2	72.5	68.7	73.4	52.6	67.1
Other	5.4	2.8	1.8	3.8	23.8	4.6
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Permit Status

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	17.9	0.6	68.6	7.6	5.4	100.0
Retail	18.5	0.6	58.3	12.4	10.2	100.0
PDR	21.6	0.7	53.9	13.7	10.1	100.0
Hotel	23.9	0.7	50.2	15.4	9.8	100.0
CIE	19.4	1.1	57.1	12.5	9.8	100.0
Residential	16.5	0.8	62.2	13.4	7.0	100.0
Other	20.2	0.5	23.2	10.1	45.9	100.0
TOTAL	17.3	0.7	60.8	12.3	8.9	100.0

Notes:

- PDR = Production/Distribution/Repair
- CIE = Cultural/Institutional/Educational
- Other represents those permits still in the pipeline.

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.4.1.B
TOTAL CONSTRUCTION
COSTS BY LAND USE
CATEGORY AND PERMIT
STATUS, 2014

This table presents the construction cost of building permits by Land Use Category and by permit status. Also included is the percentage distribution by Land Use Category and by permit status.

Total Construction Costs (2014 \$ 000s)

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	\$131,193	\$1,404	\$544,165	\$181,116	\$292,424	\$1,150,302
Retail	\$11,411	\$443	\$69,392	\$44,415	\$16,318	\$141,979
PDR	\$6,969	\$199	\$8,390	\$21,859	\$8,062	\$45,479
Hotel	\$7,960	\$146	\$4,787	\$27,493	\$57,413	\$97,799
CIE	\$5,378	\$298	\$36,179	\$319,316	\$9,567	\$370,738
Residential	\$103,023	\$2,675	\$279,490	\$681,378	\$1,867,433	\$2,933,999
Other	\$2,557	\$31	\$5,873	\$39,439	\$36,333	\$84,233
TOTAL	\$268,490	\$5,195	\$948,278	\$1,315,017	\$2,287,549	\$4,824,529

Percentage Distribution by Land Use Category

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	48.9	27.0	57.4	13.8	12.8	23.8
Retail	4.2	8.5	7.3	3.4	0.7	2.9
PDR	2.6	3.8	0.9	1.7	0.4	0.9
Hotel	3.0	2.8	0.5	2.1	2.5	2.0
CIE	2.0	5.7	3.8	24.3	0.4	7.7
Residential	38.4	51.5	29.5	51.8	81.6	60.8
Other	1.0	0.6	0.6	3.0	1.6	1.7
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

Notes:
• PDR = Production/Distribution/Repair
• CIE = Cultural/Institutional/Educational
• Other represents those permits still in the pipeline.

Sources: San Francisco Planning Department; Department of Building Inspection

Percentage Distribution by Permit Status

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	11.4	0.1	47.3	15.7	25.4	100.0
Retail	8.0	0.3	48.9	31.3	11.5	100.0
PDR	15.3	0.4	18.4	48.1	17.7	100.0
Hotel	8.1	0.1	4.9	28.1	58.7	100.0
CIE	1.5	0.1	9.8	86.1	2.6	100.0
Residential	3.5	0.1	9.5	23.2	63.6	100.0
Other	3.0	0.0	7.0	46.8	43.1	100.0
TOTAL	5.6	0.1	19.7	27.3	47.4	100.0

Table 6.4.1.C
AVERAGE CONSTRUCTION
COSTS BY LAND USE
CATEGORY AND PERMIT
STATUS, 2014

This table presents the average construction cost for all permit applications by both Land Use Category and permit status. It represents the total costs (Table 6.4.1.B) divided by the total permits (Table 6.4.1.A).

Average Construction Costs (2014 \$ 000s)

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	\$164.2	\$54.0	\$177.8	\$532.7	\$1,223.5	\$257.6
Retail	\$27.9	\$31.6	\$53.9	\$162.7	\$72.5	\$64.3
PDR	\$105.6	\$99.4	\$50.9	\$520.5	\$260.1	\$148.6
Hotel	\$117.1	\$73.0	\$33.5	\$624.9	\$2,050.4	\$343.2
CIE	\$39.5	\$37.2	\$90.2	\$3,628.6	\$138.7	\$528.1
Residential	\$33.0	\$17.5	\$23.8	\$268.3	\$1,411.5	\$195.2
Other	\$9.7	\$5.2	\$19.4	\$298.8	\$60.7	\$64.6
TOTAL	\$55.2	\$24.6	\$55.4	\$380.2	\$909.9	\$171.3

Notes:
• PDR = Production/Distribution/Repair
• CIE = Cultural/Institutional/Educational
• Other represents those permits still in the pipeline.

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.4.2.A

**BUILDING PERMITS BY
COMMERCE & INDUSTRY
DISTRICT AND PERMIT
STATUS, 2014**

This table presents the status of building permits by Commerce & Industry District. Also included is the percentage distribution by Commerce & Industry District and by permit status.

Note:
Other represents those permits still in the pipeline

Sources:
San Francisco Planning Department,
Department of Building Inspection

Number of Permits

C&I District	Approved	Canceled	Completed	Issued	Other	TOTAL
Bayview	143	7	391	71	68	680
Civic Center	209	5	705	140	98	1,157
Financial	658	18	2,455	288	216	3,635
Mission	404	9	1,267	317	236	2,233
North Beach	177	11	500	120	64	872
North Central	537	31	2,346	492	269	3,675
Northwest	405	16	1,452	328	171	2,372
South of Market	568	21	1,820	373	274	3,056
Southwest	1,527	76	5,204	1,129	605	8,541
Van Ness	225	17	975	198	119	1,534
Unclassified	9	0	10	3	394	416
TOTAL	4,862	211	17,125	3,459	2,514	28,171

Percentage Distribution by C&I District

C&I District	Approved	Canceled	Completed	Issued	Other	TOTAL
Bayview	2.9	3.3	2.3	2.1	2.7	2.4
Civic Center	4.3	2.4	4.1	4.0	3.9	4.1
Financial	13.5	8.5	14.3	8.3	8.6	12.9
Mission	8.3	4.3	7.4	9.2	9.4	7.9
North Beach	3.6	5.2	2.9	3.5	2.5	3.1
North Central	11.0	14.7	13.7	14.2	10.7	13.0
Northwest	8.3	7.6	8.5	9.5	6.8	8.4
South of Market	11.7	10.0	10.6	10.8	10.9	10.8
Southwest	31.4	36.0	30.4	32.6	24.1	30.3
Van Ness	4.6	8.1	5.7	5.7	4.7	5.4
Unclassified	0.2	0.0	0.1	0.1	15.7	1.5
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Permit Status

C&I District	Approved	Canceled	Completed	Issued	Other	TOTAL
Bayview	21.0	1.0	57.5	10.4	10.0	100.0
Civic Center	18.1	0.4	60.9	12.1	8.5	100.0
Financial	18.1	0.5	67.5	7.9	5.9	100.0
Mission	18.1	0.4	56.7	14.2	10.6	100.0
North Beach	20.3	1.3	57.3	13.8	7.3	100.0
North Central	14.6	0.8	63.8	13.4	7.3	100.0
Northwest	17.1	0.7	61.2	13.8	7.2	100.0
South of Market	18.6	0.7	59.6	12.2	9.0	100.0
Southwest	17.9	0.9	60.9	13.2	7.1	100.0
Van Ness	14.7	1.1	63.6	12.9	7.8	100.0
Unclassified	2.2	0.0	2.4	0.7	94.7	100.0
TOTAL	17.3	0.7	60.8	12.3	8.9	100.0

Table 6.4.2.B
TOTAL CONSTRUCTION
COSTS BY COMMERCE &
INDUSTRY DISTRICT AND
PERMIT STATUS, 2014

This table presents the construction cost of building permits by Commerce & Industry District and by permit status. Also included is the percentage distribution by Commerce & Industry District and by permit status.

Note:
 Other represents those permits still in the pipeline.

Sources:
 San Francisco Planning
 Department; Department of
 Building Inspection

Total Construction Costs (2014 \$ 000s)

C&I District	Approved	Canceled	Completed	Issued	Other	TOTAL
Bayview	\$72,734	\$162	\$16,930	\$147,213	\$33,528	\$270,568
Civic Center	\$12,897	\$53	\$53,680	\$43,425	\$201,634	\$311,688
Financial	\$40,474	\$688	\$332,780	\$114,408	\$557,212	\$1,045,562
Mission	\$12,383	\$108	\$36,260	\$31,440	\$88,388	\$168,579
North Beach	\$4,550	\$204	\$16,849	\$39,051	\$8,547	\$69,202
North Central	\$15,031	\$746	\$59,819	\$66,360	\$40,414	\$182,370
Northwest	\$10,334	\$318	\$36,051	\$46,446	\$20,563	\$113,712
South of Market	\$62,073	\$1,130	\$232,604	\$635,416	\$559,556	\$1,490,779
Southwest	\$31,443	\$1,334	\$128,771	\$162,843	\$76,383	\$400,773
Van Ness	\$6,363	\$453	\$34,264	\$21,715	\$35,249	\$98,044
Unclassified	\$208	\$0	\$270	\$6,700	\$666,075	\$673,253
TOTAL	\$268,490	\$5,195	\$948,278	\$1,315,017	\$2,287,549	\$4,824,529

Percentage Distribution by C&I District

C&I District	Approved	Canceled	Completed	Issued	Other	TOTAL
Bayview	27.1	3.1	1.8	11.2	1.5	5.6
Civic Center	4.8	1.0	5.7	3.3	8.8	6.5
Financial	15.1	13.2	35.1	8.7	24.4	21.7
Mission	4.6	2.1	3.8	2.4	3.9	3.5
North Beach	1.7	3.9	1.8	3.0	0.4	1.4
North Central	5.6	14.4	6.3	5.0	1.8	3.8
Northwest	3.8	6.1	3.8	3.5	0.9	2.4
South of Market	23.1	21.8	24.5	48.3	24.5	30.9
Southwest	11.7	25.7	13.6	12.4	3.3	8.3
Van Ness	2.4	8.7	3.6	1.7	1.5	2.0
Unclassified	0.1	0.0	0.0	0.5	29.1	14.0
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Permit Status

C&I District	Approved	Canceled	Completed	Issued	Other	TOTAL
Bayview	26.9	0.1	6.3	54.4	12.4	100.0
Civic Center	4.1	0.0	17.2	13.9	64.7	100.0
Financial	3.9	0.1	31.8	10.9	53.3	100.0
Mission	7.3	0.1	21.5	18.6	52.4	100.0
North Beach	6.6	0.3	24.3	56.4	12.4	100.0
North Central	8.2	0.4	32.8	36.4	22.2	100.0
Northwest	9.1	0.3	31.7	40.8	18.1	100.0
South of Market	4.2	0.1	15.6	42.6	37.5	100.0
Southwest	7.8	0.3	32.1	40.6	19.1	100.0
Van Ness	6.5	0.5	34.9	22.1	36.0	100.0
Unclassified	0.0	0.0	0.0	1.0	98.9	100.0
TOTAL	5.6	0.1	19.7	27.3	47.4	100.0

Table 6.4.2.C

AVERAGE CONSTRUCTION COSTS BY COMMERCE & INDUSTRY DISTRICT AND PERMIT STATUS, 2014

This table presents the average construction cost for all permit applications by both Commerce & Industry District and permit status. It represents the total costs (Table 6.4.1.B) divided by the total permits (Table 6.4.1.A).

Average Construction Costs (2014 \$ 000s)

C&I District	Approved	Cancelled	Completed	Issued	Other	TOTAL
Bayview	\$508.6	\$23.1	\$43.3	\$2,073.4	\$493.1	\$397.9
Civic Center	\$61.7	\$10.6	\$76.1	\$310.2	\$2,057.5	\$269.4
Financial	\$61.5	\$38.2	\$135.6	\$397.2	\$2,579.7	\$287.6
Mission	\$30.7	\$12.0	\$28.6	\$99.2	\$374.5	\$75.5
North Beach	\$25.7	\$18.6	\$33.7	\$325.4	\$133.5	\$79.4
North Central	\$28.0	\$24.1	\$25.5	\$134.9	\$150.2	\$49.6
Northwest	\$25.5	\$19.9	\$24.8	\$141.6	\$120.3	\$47.9
South of Market	\$109.3	\$53.8	\$127.8	\$1,703.5	\$2,042.2	\$487.8
Southwest	\$20.6	\$17.5	\$24.7	\$144.2	\$126.3	\$46.9
Van Ness	\$28.3	\$26.7	\$35.1	\$109.7	\$296.2	\$63.9
Unclassified	\$23.1	--	\$27.0	\$2,233.3	\$1,690.5	\$1,618.4
TOTAL	\$55.2	\$24.6	\$55.4	\$380.2	\$909.9	\$171.3

Note: Other represents those permits still in the pipeline.

Sources: San Francisco Planning Department; Department of Building Inspection

Table & Figure 6.5

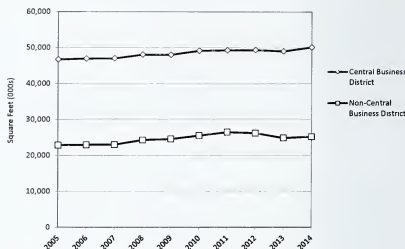
TOTAL OFFICE SPACE IN CENTRAL AND NON-CENTRAL BUSINESS DISTRICTS, 2005–2014

This table presents the total existing office space in the central and non-central business districts over the last ten years. It also conveys the percent change by year. This information is presented graphically in Figure 6.5.

Note:

- Office Space includes large commercial buildings of 25,000 rentable square feet or larger in the Central and Non-Central Business Districts, which are defined below. Not included are government, medical, and owner occupied buildings.
- The Central Business District includes the Financial District areas both north and south of Market Street.
- The Non-Central Business District includes Jackson Square, North Waterfront, Yerba Buena, South of Market, West of Kearny, West of Van Ness Corridor, Van Ness, and Union Square.

Sources: Cushman & Wakefield of California Research Services; San Francisco Planning Department

**Building Square Footage (000s)**

Location	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Central Business District	46,719	46,956	47,026	48,084	48,039	49,158	49,310	49,368	49,048	50,154
Non-Central Business District	22,845	22,932	22,996	24,300	24,569	25,539	26,488	26,205	24,871	25,252
TOTAL	69,564	69,888	70,022	72,384	72,608	74,697	75,798	75,573	73,919	75,406

Percentage Change

Location	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
Central Business District	0.5	0.1	2.3	-0.1	2.3	0.3	0.1	-0.6	2.3
Non-Central Business District	0.4	0.3	5.7	1.1	3.9	3.7	-1.1	-5.1	1.5
TOTAL	0.5	0.2	3.4	0.3	2.9	1.5	-0.3	-2.2	2.0



Planning Department Plan Areas

0 1 2 Miles

MAP 6.2

Table 6.6

LAND USE SQUARE FOOTAGE BY PLAN AREA, 2014

This table conveys the area square footage for each land use category for the 20 plan areas in San Francisco. These plan areas are shown in Map # 2

Plan Area	Residential	Mixed Res.	Office	Retail	PDH	CIL	Hotel	Mixed Use	Parking	Other	TOTAL
Balboa	361.3	192.2	13.2	263.5	63.1	2,904.9	0.0	76.6	2,532.2	1,383.43	0.0
Bayview	18,186.1	1,387.1	1,242.5	1,692.2	12,687.6	8,053.9	10.0	5,651.5	11,884.1	8,669.0	478.7
C-3	196.6	516.4	2,947.6	1,141.8	263.3	196.2	1,197.9	1,976.5	306.6	297.0	30.6
Central Waterfront	471.0	414.5	353.8	247.8	8,601.3	59.1	2.0	1,077.9	2,894.8	2,763.8	2.4
East Soma	1,476.8	1,436.5	1,352.3	370.1	1,049.6	230.2	61.4	924.2	733.7	1,309.3	64.1
Geary	12,513.4	1,035.8	183.5	916.8	130.4	2,758.5	76.8	962.5	832.8	413.7	112.7
Hunters Point Shipyard	0.0	0.0	0.0	0.0	18,141.6	975.8	0.0	0.0	0.0	2,618.9	0.0
Market/Octavia	5,109.7	1,086.4	676.2	736.8	425.1	969.5	78.3	444.5	573.2	814.3	10.2
Mid Market	310.8	82.9	657.5	227.6	167.0	67.1	142.3	252.0	0.0	423.2	0.0
Mission	12,061.5	2,134.3	618.3	1,493.0	2,751.8	2,041.0	71.5	1,829.7	637.6	955.5	138.0
Mission Bay	3,440.4	343.8	151.6	197.9	426.3	793.1	0.0	254.1	268.0	5,482.9	164.7
Presidio	51.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	65,583.8	69.8	0.0
Rest of the City	350,402.5	15,682.5	4,704.5	7,353.2	6,548.3	51,374.8	2,147.1	7,829.3	201,122.0	19,510.3	2,909.4
Rincon Hill	272.9	375.7	280.1	49.8	29.0	187.5	0.0	56.4	7.0	373.9	0.0
Showplace Sq/Potrero Hill	7,990.4	848.9	682.4	613.4	2,041.8	1,782.5	0.0	1,814.8	683.1	3,374.3	53.0
Transbay	76.6	21.7	510.4	125.9	37.5	16.1	18.6	138.0	0.0	822.5	0.0
Van Ness	744.7	538.1	178.4	354.4	292.6	234.7	236.6	351.0	0.0	78.2	0.0
Visitation Valley	8,452.9	148.5	281.3	106.6	957.2	372.1	0.0	32.9	625.7	768.7	104.3
West Soma	1,002.9	652.0	657.3	875.0	2,334.6	666.9	83.3	1,100.9	10.2	1,304.5	0.0
Yerba Buena	106.0	153.0	173.1	162.7	25.9	229.9	223.3	640.2	330.0	52.7	0.0
TOTAL	423,229.7	27,050.3	15,664.2	16,888.4	56,974.1	73,933.7	4,394.3	25,413.0	289,024.9	51,485.6	4,068.1

CONTINUED >

TABLE 6.6 LAND USE SQUARE FOOTAGE BY PLAN AREA, 2011 (CONTINUED)

Percentage Distribution by Planning Area

Plan Area	Residential	Mixed Res	Office	Retail	PDR	CIE	Hotel	Mixed Uses	Public/OS	Vacant	Other	TOTAL
Balboa	4.6	2.5	0.2	3.4	0.8	37.3	0.0	1.0	32.5	17.8	0.0	100.0
Bayview	26.0	2.0	1.8	2.4	18.1	11.5	0.0	8.1	17.0	12.4	0.7	100.0
C-3	2.2	5.7	32.5	12.6	2.9	2.2	13.2	21.8	3.4	3.3	0.3	100.0
Central Waterfront	2.8	2.5	2.1	1.5	50.9	0.3	0.0	6.4	17.1	16.4	0.0	100.0
East Soma	16.4	15.9	15.0	4.1	11.7	2.6	0.7	10.3	8.1	14.5	0.7	100.0
Geary	62.8	5.2	0.9	4.6	0.7	13.8	0.4	4.8	4.2	2.1	0.6	100.0
Hunters Point Shipyard	0.0	0.0	0.0	0.0	83.5	4.5	0.0	0.0	0.0	12.0	0.0	100.0
Market/Octavia	46.7	9.9	6.2	6.7	3.9	9.0	0.7	4.1	5.2	7.4	0.1	100.0
Mid-Market	13.3	3.6	28.2	9.8	7.2	2.9	6.1	10.8	0.0	18.2	0.0	100.0
Mission	48.8	8.6	2.5	5.9	11.1	8.3	0.3	7.4	2.6	3.9	0.6	100.0
Mission Bay	29.9	3.0	1.3	1.7	3.7	6.9	0.0	2.2	2.3	47.6	1.4	100.0
Presidio	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	99.8	0.1	0.0	100.0
Rest of the City	52.3	2.3	0.7	1.1	1.0	7.7	0.3	1.2	30.0	2.9	0.4	100.0
Rincon Hill	16.7	23.0	17.2	3.1	1.8	11.5	0.0	3.5	0.4	22.9	0.0	100.0
Showplace Sq/Potrero Hill	40.2	4.3	3.4	3.1	10.3	9.0	0.0	9.1	3.4	17.0	0.3	100.0
Transbay	4.3	1.2	28.9	7.1	2.1	0.9	1.1	7.8	0.0	46.5	0.0	100.0
Van Ness	24.8	17.9	5.9	11.8	9.7	7.8	7.9	11.7	0.0	2.6	0.0	100.0
Visitacion Valley	71.3	1.3	2.4	0.9	8.1	3.1	0.0	0.3	5.3	6.5	0.9	100.0
West Soma	11.5	7.5	7.6	10.1	26.9	7.7	1.0	12.7	0.1	15.0	0.0	100.0
Yerba Buena	5.1	7.3	8.3	7.8	1.2	11.0	10.7	30.5	15.7	2.5	0.0	100.0
TOTAL	42.8	2.7	1.6	1.7	5.8	7.5	0.4	2.6	29.3	5.2	0.4	100.0

Percentage Distribution by Land Use Category

Plan Area	Residential	Mixed Res	Office	Retail	PDR	CIE	Hotel	Mixed Uses	Public/OS	Vacant	Other	TOTAL
Balboa	0.1	0.7	0.1	1.6	0.1	3.9	0.0	0.3	0.9	2.7	0.0	0.8
Bayview	4.3	5.1	7.9	10.0	22.3	10.9	0.2	22.2	4.1	16.8	11.8	7.1
C-3	0.0	1.9	18.8	6.8	0.5	0.3	27.5	7.8	0.1	0.6	0.8	0.9
Central Waterfront	0.1	1.5	2.3	1.5	15.1	0.1	0.0	4.2	1.0	5.4	0.1	1.7
East Soma	0.3	5.3	8.6	2.2	1.8	0.3	1.4	3.6	0.3	2.5	1.6	0.9
Geary	3.0	3.8	1.2	5.4	0.2	3.7	1.8	3.8	0.3	0.8	2.8	2.0
Hunters Point Shipyard	0.0	0.0	0.0	0.0	31.8	1.3	0.0	0.0	0.0	5.1	0.0	2.2
Market/Octavia	1.2	4.0	4.3	4.4	0.7	1.3	1.8	1.7	0.2	1.6	0.3	1.1
Mid-Market	0.1	0.3	4.2	1.3	0.3	0.1	3.3	1.0	0.0	0.8	0.0	0.2
Mission	2.8	7.9	3.9	8.6	4.8	2.8	1.6	7.2	0.2	1.9	3.4	2.5
Mission Bay	0.8	1.3	1.0	1.2	0.7	1.1	0.0	1.0	0.1	10.6	4.0	1.2
Presidio	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	22.7	0.1	0.0	6.6
Rest of the City	82.8	58.0	30.0	43.5	11.5	69.5	49.4	30.8	69.6	37.9	71.5	67.8
Rincon Hill	0.1	1.4	1.8	0.3	0.1	0.3	0.0	0.2	0.0	0.7	0.0	0.2
Showplace Sq/Potrero Hill	1.9	3.1	4.4	3.6	3.6	2.4	0.0	7.1	0.2	6.6	1.3	2.0
Transbay	0.0	0.1	3.3	0.7	0.1	0.0	0.4	0.5	0.0	1.6	0.0	0.2
Van Ness	0.2	2.0	1.1	2.1	0.5	0.3	5.4	1.4	0.0	0.2	0.0	0.3
Visitacion Valley	2.0	0.5	1.8	0.6	1.7	0.5	0.0	0.1	0.2	1.5	2.6	1.2
West Soma	0.2	2.4	4.2	5.2	4.1	0.9	1.9	4.3	0.0	2.5	0.1	0.9
Yerba Buena	0.0	0.6	1.1	1.0	0.0	0.3	5.1	2.5	0.1	0.1	0.0	0.2
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Notes: Mixed Res = Mixed Residential; PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational; Public/OS = Public and Open Space.

Sources: San Francisco Office of the Assessor-Recorder; San Francisco Planning Department; Dun & Bradstreet



7.0 Transportation

The primary purpose of this chapter on transportation is to systematically track and publish information on transportation trends in San Francisco. While there are a number of ways of measuring trends in urban mobility in this city, for consistency, this chapter presents much of the same type of transportation data collected as part of the *Downtown Plan Monitoring Report*. The *Downtown Plan Monitoring Report* is an assessment of the effectiveness of the *Downtown Plan*, prepared every five years as mandated in Chapter 10E of the San Francisco Administrative Code. This chapter tracks changes in transportation trends and provides recent data in the following areas:

- Mode split;
- Parking entitlements;
- Vehicle occupancy;
- Transit service; and
- Transit Impact Development Fee (TIDF) revenues.

The transportation data presented in this chapter come from a number of government agency sources, primarily the Planning Department and Municipal Transportation Agency (SFMTA), but also the American Community Survey, a service of the U.S. Census Bureau. For the purposes of this chapter, data are reported on an annual or biennial basis, either as part of a larger series of thematic reports or as a stand-alone set of data specifically compiled for this inventory report.

7.1 MODE SPLIT

Daily commuters access San Francisco through a number of different transportation modes, including single occupant vehicle (or drive alone); carpool or vanpool; public transit; walking; bicycle; and other modes (e.g., motorcycles, taxicabs). In addition, an increasing number of commuters regularly work at home at least one day a week.

Local trends in commute mode share over the past six years are contained in *Table 7.1*. Data is provided for both San Francisco residents working in all locations (residents), as well as San Francisco employees either residing in San Francisco County or another county in the region (employees).

7.2 PARKING ENTITLEMENTS

Studies have shown that the volume and nature of travel is influenced by the availability and price of parking. Where parking is cheap and available, employees tend to drive to work, rather than seek other alternatives. However, where parking is more expensive and alternatives are available, commuters tend to use alternative modes some of the time.

For the purposes of this chapter, annual parking entitlements were obtained from the Planning Department database. The data are the number of off-street parking spaces approved by the Planning Commission, Zoning Administrator, and Major Environmental Review section of the Department as part of the permit approval process.

The parking entitlement data are included in *Table 7.2*. The total number of projects and corresponding parking spaces for calendar years 2010 through 2012 are listed by zoning district. Data for 2013 and 2014 was not available.

7.3 VEHICLE OCCUPANCY

This indicator measures the average number of individuals per private vehicle during critical periods of the day, when traffic congestion is at its highest (e.g., peak commute periods). The primary source for local vehicle occupancy rates is the American Community Survey (ACS) undertaken by the U.S. Bureau of the Census.

This survey estimated the number of individuals commuting to work and their principal modes of travel: drive alone, carpool, public transit, bicycle, walk and other. In order to compute the average vehicle occupancy, the ACS takes the number of commuters arriving by private vehicle (drive alone or carpool/vanpool) and divides by the number of private vehicles.

The data is presented in *Table 7.3*.

7.4 TRANSIT RIDERSHIP

Levels of transit service are commonly expressed in terms of transit ridership along a specific line or in specific service areas. In this case, MUNI, the transit operating division of the SFMTA, provides periodic ridership volumes for all of its lines. These data, covering average daily volumes during Fiscal Years 2010 (2009-10) and 2014 (2013-14), are reported in *Table 7.4*. This table provides ridership data for all of MUNI's existing transit routes throughout the city, including and light rail service, but excludes cable car ridership.

7.5 TIDF REVENUES

The SFMTA Finance Division assembles data on the volume of revenue collected from the Transit Impact Development Fee (TIDF). These fees, which are collected from building applicants just prior to the issuance of a certificate of occupancy, are subsequently deposited into an account for use by the SFMTA. Historically, data have indicated wide variations in the volume of revenues collected each year, depending on the number and size of projects approved.

The TIDF has been in effect in San Francisco since 1981, although litigation prevented collection of this fee until three years later. Originally, the TIDF was developed to offset the increased marginal operating and capital costs incurred by MUNI in the late 1970s, during the boom in office development. In response to increasing transit demand, this new fee was designed to provide expanded peak period transit service to downtown MUNI routes. While the application of this fee was originally limited to all new and converted office space in downtown San Francisco, in 2004, legislation expanded its application to most non-residential uses throughout the city.

Annual revenues from the TIDF are shown in *Table 7.5*. They have been inflation adjusted to 2014 dollars.

Table 7.1 MODE SPLIT FOR COMMUTERS, 2009–2014

Table 7.1 presents the most recent mode split data for San Francisco's residents and employees. It is shown in terms of the percentages of all trips.

Mode	Residents						Employees					
	2009	2010	2011	2012	2013	2014	2009	2010	2011	2012	2013	2014
Drive Alone	38.9	36.0	37.6	36.3	36.4	34.2	36.6	35.3	37.1	35.0	33.3	33.0
Carpool/Vanpool	7.4	7.9	7.3	7.7	6.8	7.1	11.0	10.5	9.5	9.7	9.4	9.3
Transit	31.8	34.1	31.6	33.1	32.7	34.0	35.6	37.5	36.0	38.3	39.4	40.0
Walk	10.3	9.4	9.9	9.8	10.9	11.2	7.6	7.1	7.0	7.1	7.8	7.7
Bicycle	3.0	3.5	3.4	3.8	3.8	4.4	2.2	2.6	2.5	2.7	2.7	3.0
Work at Home	6.8	6.7	7.8	6.7	6.8	7.0	4.8	5.0	5.6	4.9	4.9	4.8
Other	1.8	2.4	2.3	2.6	2.6	2.1	2.2	1.9	2.3	2.2	2.6	2.2
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source: US Census, American Community Surveys.

Table 7.2

**PARKING ENTITLEMENTS
BY PLANNING
COMMISSION, ZONING
ADMINISTRATOR OR
MAJOR ENVIRONMENTAL
ANALYSIS, 2010–2014**

Table 7.2 presents the most recent data on parking projects and spaces entitled by either the Planning Commission, Zoning Administrator, or the Department's Environmental Planning Division.

Zoning District	2010		2011		2012		2013		2014	
	Projects	Net Spaces	Projects	Net Spaces	Projects	Net Spaces	Projects	Net Spaces	Projects	Net Spaces
C-2	1	-25	1	-1	1	4	0	0	0	0
C-3-G	0	225	1	113	0	0	1	40	1	5
C-3-O	0	0	1	129	0	0	1	0	1	0
C-3-O(SD)	1	10	0	0	1	0	3	215	0	0
C-3-R	0	0	1	40	0	0	0	0	0	0
C-3-S	0	0	0	0	0	0	1	0	0	0
CRNC	0	0	0	0	1	-1	0	0	0	0
C-M	0	0	0	0	0	0	0	0	0	0
M-1	0	0	0	0	1	168	0	0	0	0
PDR-1-D	0	0	0	0	1	7	1	20	0	0
PDR-2	0	0	1	20	0	0	0	0	0	0
NC-1	0	0	0	0	1	0	0	0	1	0
NC-2	0	0	0	0	0	0	0	0	0	0
NC-3	1	0	1	0	1	-8	2	80	0	0
HAIGHT	1	0	0	0	0	0	0	0	1	-13
24th St-Mission	0	0	0	0	0	0	3	-120	1	-4
INNER SUNSET	0	0	0	0	0	0	0	0	1	66
PACIFIC	0	0	0	0	0	0	1	0	3	-1
POLK	2	31	0	0	1	10	1	10	0	0
UPR MARKET NCD	0	0	0	0	1	26	1	7	2	176
NCT-2	0	0	0	0	1	0	2	48	0	0
NCT-3	2	39	0	0	0	0	0	0	0	0
UPR MARKET NCT	0	0	0	0	1	44	0	0	0	0
Valencia St NCT	0	0	1	22	0	0	0	0	0	0
Mission St NCT	0	0	1	0	0	0	0	0	0	0
HAYES NCT	1	4	1	-32	1	7	0	0	1	80
HAYES NCT/RTO	0	0	0	0	1	126	0	0	0	0
Ocean Avenue NCT	0	0	0	0	0	0	0	0	1	35
Ocean Avenue NCT/P	1	-16	0	0	0	0	1	585	3	105
RC-3	1	38	0	0	0	0	1	0	2	1
RC-4	1	670	0	0	1	520	0	0	0	0
RED	0	0	0	0	0	0	0	0	2	61
RED/SLR	0	0	0	0	0	0	6	1	6	2
RH DTR	0	0	1	358	1	19	8	37	13	7
RH-1	3	78	1	0	2	-1	2	5	7	33
RH-2	0	0	5	5	1	1	2	58	2	2
RH-3	1	1	3	7	0	0	0	0	0	0
RM-1	1	3	1	43	1	-1	0	-7	0	0
RM-1/RM-4	0	0	1	6,975	0	0	0	0	1	4
RM-2	0	0	2	3	0	0	0	0	0	0
RM-3	0	0	1	2	0	0	0	0	0	0
RM-4	0	0	0	0	0	0	2	0	1	0
RSD	0	0	0	0	0	0	1	0	3	-11
RTO	3	107	2	30	1	0	0	0	0	0
RTO-Mission	1	-1	0	0	1	0	0	0	0	0
SLI	1	14	0	0	0	0	0	0	0	0
SLR	1	0	0	0	0	0	4	92	3	64
SPD	0	0	0	0	1	2	0	0	0	0
UMU	3	-87	4	594	1	8	0	0	1	36
MUG	0	0	0	0	0	0	1	0	0	0
MUO	0	0	0	0	0	0	0	0	0	0
MUR	2	204	0	0	1	24	0	0	0	0
WMUG	0	0	0	0	1	358	0	0	0	0
P	0	0	0	0	1	241	0	0	0	0
TOTAL	28	1,295	30	8,308	26	1,554	45	1,071	57	648

Note:

- "C" refers to commercial districts
- "DTR" refers to downtown residential districts
- "M" refers to PDR districts
- "MU" and "UMU" refers to mixed use districts
- "NC" and named areas refer to neighborhood commercial districts
- "P" refers to the public district
- "R" refers to residential districts
- "S" refers to support activity districts

Source: San Francisco Planning Department

Table 7.3

PRIVATE VEHICLE OCCUPANCY IN San Francisco, 2008–2014

Table 7.3 presents data on private vehicle occupancy rates in San Francisco. It describes the average number of people per trip in San Francisco.

Population	2008	2009	2010	2011	2012	2013	2014
San Francisco Employees	1.14	1.16	1.15	1.13	1.14	1.14	1.14

Sources: US Census American Community Survey

Table 7.4

TRANSIT
RIDERSHIP ON
MUNI LINES,
2010 & 2014

Table 7.4 presents data on average daily ridership on MUNI lines for 2010 and 2014.

Daily Ridership by Route

Route Nos	Route Name	2010	2014	Difference	% Change
1, 1AX, 1BX	California	27,006	28,300	1,294	4.8%
2	Clement	6,685	5,437	-1,248	-18.7%
3	Jackson	3,859	4,115	256	6.6%
5	Fulton	15,887	21,000	5,113	32.2%
6	Parnassus	8,748	7,746	-1,002	-11.5%
9, 9L, 8X, 8AX, 8BX	San Bruno	49,804	52,903	3,099	6.2%
10	Townsend	4,705	5,872	1,167	24.8%
12	Folsom	5,587	5,365	-222	-4.0%
14, 14L, 14X	Mission	40,177	47,455	7,278	18.1%
16AX, 16BX	Noriega Express	1,629	1,434	-195	-12.0%
17	Parkmerced	947	1,247	300	31.7%
18	46th Avenue	3,240	4,110	870	26.9%
19	Polk	8,160	8,235	75	0.9%
21	Hayes	13,054	7,568	-5,486	-42.0%
22	Fillmore	18,340	17,163	-1,177	-6.4%
23	Monterey	4,806	4,289	-517	-10.8%
24	Divisadero	9,859	11,478	1,619	16.4%
27	Bryant	9,228	6,841	-2,387	-25.9%
28, 28L	19th Avenue	14,255	15,270	1,015	7.1%
29	Sunset	16,838	19,749	2,911	17.3%
30, 30X	Stockton	30,533	29,196	-1,337	-4.4%
31, 31AX, 31BX	Balboa	11,903	11,920	17	0.1%
33	Stanyan	6,164	6,842	678	11.0%
35	Eureka	568	821	253	44.6%
36	Teresita	1,442	1,611	169	11.7%
37	Corbett	1,827	2,341	514	28.2%
38, 38L, 38AX, 38BX	Geary	51,290	53,531	2,241	4.4%
39	Coit	664	584	-80	-12.0%
41	Union	3,385	3,380	-5	-0.1%
43	Masonic	12,209	13,152	943	7.7%
44	O'Shaughnessy	14,513	16,163	1,650	11.4%
45	Union-Stockton	13,971	11,554	-2,417	-17.3%
47	Van Ness	12,668	12,593	-75	-0.6%

Source:
San Francisco Municipal
Transportation Agency

CONTINUED >

TABLE 7.4
TRANSIT RIDERSHIP
ON MUNI LINES, 2010
& 2014 (CONTINUED)

Daily Ridership by Route

Route Nos.	Route Name	2010	2014	Difference	% Change
48	Quintara-24th Street	13,954	8,447	-5,507	-39.5%
49	Van Ness-Mission	24,626	23,488	-1,138	-4.6%
52	Excelsior	1,843	2,202	359	19.5%
54	Felton	8,945	6,838	-2,107	-23.6%
56	Rutland	474	467	-7	-1.5%
66	Quintara	428	831	403	94.0%
67	Bernal Heights	3,337	1,662	-1,675	-50.2%
71, 71L	Haight-Noriega	13,837	12,135	-1,702	-12.3%
80X	Gateway Express	65	0	-65	-100.0%
81X	Caltrain Express	224	170	-54	-24.2%
82X	Levi Plaza Express	484	708	224	46.4%
88	BART Shuttle	592	450	-142	-24.0%
90	Owl	220	331	111	50.1%
91	Owl	326	834	508	156.2%
108	Treasure Island	2,495	3,216	721	28.9%
F	Market	20,921	22,608	1,687	8.1%
J	Church	14,867	16,315	1,448	9.7%
K/T	Ingleside/Third	30,183	35,527	5,344	17.7%
L	Taraval	26,098	30,977	4,878	18.7%
M	Ocean View	28,960	28,652	-309	-1.1%
N	Judah	37,598	44,331	6,733	17.9%
New Routes					
83X	Mid-Market Express	na	573	na	na
NX	Judah Express	na	1,300	na	na
TOTAL		654,428	681,326	26,898	4.1%

Table 7.5
TRANSIT IMPACT
DEVELOPMENT FEE
(TIDF) REVENUE
COLLECTED (INFLATION-
ADJUSTED), FISCAL
YEARS 2005–2014

Table 7.5 presents data on TIDF revenues collected in San Francisco since Fiscal Year 2005 (July 1, 2004 - June 30, 2005) in 2014 dollars.

Fiscal Year	Fee Structure	Collections (2014 \$)
2004–2005	2004 Ordinance	\$1,181,251
2005–2006	2004 Ordinance	\$1,439,385
2006–2007	2004 Ordinance	\$2,375,226
2007–2008	2007 Ordinance	\$1,033,493
2008–2009	2007 Ordinance	\$5,149,695
2009–2010	2007 Ordinance	\$2,084,869
2010–2011	2010 Ordinance	\$1,162,325
2011–2012	2010 Ordinance	\$1,825,037
2012–2013	2010/2013 Ordinance	\$4,964,465
2013–2014	2013/2014 Ordinance	\$12,572,845

Source: San Francisco Municipal Transportation Agency

Acknowledgements

Mayor

Edwin M. Lee

Board of Supervisors

London Breed, President

John Avalos

David Campos

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Julie Christensen

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Outside Agencies

With assistance from:

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Bureau of Labor Statistics

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California Department of Finance

California Employment Development Department

California State Board of Equalization

Cushman & Wakefield

Dun & Bradstreet

San Francisco Controller's Office

San Francisco Department of Building Inspection

